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Major Appliances and Electric Housewares

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MAJOR APPLIANCES AND ELECTRIC HOUSEWARES

Market Trends

The increased rate of new housing starts, stabilizing interest rates and the return of consumer confidence in the economy in 1983 have all contributed to the healthy outlook for the major appliances and electric housewares industry.

With the replacement market traditionally accounting for about two-thirds of all major appliance purchases, the unwillingness of consumers to buy "big-ticket" items hurt the industry during the recession. Now, however, consumers are signaling their interest in credit buying once again. According to a Business Week/ Louis Harris poll of 1,254 adults nationwide (BW, October 17, 1983), only 13% expect to curtail spending in the next 12 months--about half the number who did decrease spending in the year prior to the survey. Specifically, 47% expect to purchase a small electric appliance over the next 2 years and 32% say they will buy a major appliance. In addition, 13% expect to buy a new home in the next 24 months, up from the 8% who bought homes in the previous 2 year period. Because of this surge in pent-up consumer demand, some trade sources believe the replacement market may account for about 70% of total sales in the mid-1980's.

Sales to home builders represent approximately a quarter of major appliance sales. Housing start projections for 1983, based on actual January through August starts, are 75% higher than in 1982. Authorizations granted for future housing starts are also up 75%. Normally, it takes about 6 months to build a house. Therefore, the industry is looking forward to rising sales during the second half of 1983 as newly completed houses are sold. If the housing market stays on track, this will be another source for increased sales.

Besides the replacement and new housing markets, the relatively low saturation levels of some major appliances and electric housewares will be instrumental in the industry's revitalization. Microwave ovens are a prime example. Today they are found in only 25% of American homes. Dishwashers and trash compactors are other appliances with low saturation rates. Among electric housewares products, much excitement has been generated by the new line of space-saving appliances, designed to fit in out-of-the-way places and compact kitchens.

Prospects are good for continued growth in appliances and housewares for several years to come. During the next five years, according to the Bureau of Industrial Economics, shipments of household appliances are expected to rise at a real (adjusted for inflation) compound annual rate of 5.0%.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

The U.S. Bureau of the Census conducts a complete census of U.S. manufacturers every five years. The most recent published data covers the year 1977. Between censuses, the Bureau compiles annual surveys among a representative sample of manufacturers which are the basis for estimates on key measures of manufacturing activity for industry groups, thus providing a continuous series of basic industry statistics which are reported in the following table.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

In addition to the annual Census Bureau surveys, the Bureau of Industrial Economics, Department of Commerce, reports on manufacturing activity in the annual Industrial Outlook and issues industry projections.

Industry shipments of major appliances and electric housewares were valued at $13.1 billion in 1981, but slipped 4.8% in 1982 to reach a total of $12.5 billion. Projections for the year 1983 by the Bureau of Industrial Economics look for a 14% increase with the total reaching about $14.8 billion.

	1981	1980	1979	1977
Household Appliances (SIC 363*) (Includes Electric Housewares)				
Number of companies	na	na	na	528
Number of establishments, total**	na	586	597	666
Number with 20 or more employees	347	350	353	342
Employees, total (thous.)	148.3	155.2	161.3	162.3
Production workers (thous.)	116.3	121.4	126.9	128.7
Payroll (mil. $)	$ 2,343.7	$ 2,357.5	$2,181.0	$ 1,898.1
Value added by manufacture# (mil. $)	5,925.5	5,985.1	5,960.8	5,276.2
Value of industry shipments## (mil. $)	13,108.1	12,936.0	12,740.8	10,736.5
Capital expenditures, new (mil. $)	304.6	280.7	236.0	207.0

	1981	1980	1979	1977
Household Refrigerators, Freezers (SIC 3632*)				
Number of companies	na	na	na	33
Number of establishments, total**	na	38	36	42
Number with 20 or more employees	na	27	27	25
Employees, total (thous.)	27.1	27.2	28.9	35.8
Production workers (thous.)	22.9	23.0	24.6	29.8
Payroll (mil. $)	$ 469.7	$ 422.1	$ 424.6	$ 468.6
Value added by manufacture# (mil. $)	1,059.9	1,034.4	1,130.6	1,166.1
Value of industry shipments## (mil. $)	2,702.9	2,460.2	2,683.8	2,576.6
Capital expenditures, new (mil. $)	55.8	55.4	38.6	46.9

	1981	1980	1979	1977
Household Cooking Equipment (SIC 3631*)				
Number of companies	na	na	na	84
Number of establishments, total**	na	75	83	96
Number with 20 or more employees	na	58	62	58
Employees, total (thous.)	27.3	28.1	29.1	25.4
Production workers (thous.)	20.9	21.1	21.6	19.1
Payroll (mil. $)	$ 417.3	$ 398.9	$ 384.1	$ 289.1
Value added by manufacture# (mil. $)	1,041.8	968.0	991.1	784.1
Value of industry shipments## (mil. $)	2,525.9	2,465.5	2,353.4	1,707.2
Capital expenditures, new (mil. $)	57.7	49.8	41.5	36.1

(continued)

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

Household Laundry Equipment (SIC 3633*)	1981	1980	1979	1977
Number of companies	na	na	na	21
Number of establishments, total**	na	29	30	31
Number with 20 or more employees	na	26	26	24
Employees, total (thous.)	18.9	19.2	20.1	19.4
Production workers (thous.)	15.6	15.7	16.7	15.9
Payroll (mil. $)	$ 360.2	$ 331.6	$ 323.0	$ 262.4
Value added by manufacture# (mil. $)	1,021.3	989.5	1,066.5	844.7
Value of industry shipments## (mil. $)	2,259.0	2,142.2	2,214.7	1,792.8
Capital expenditures, new (mil. $)	43.5	45.6	32.0	27.3

Household Vacuum Cleaners (SIC 3635*)	1981	1980	1979	1977
Number of companies	na	na	na	32
Number of establishments, total**	na	32	34	35
Number with 20 or more employees	na	21	24	22
Employees, total (thous.)	9.5	10.3	11.2	10.4
Production workers (thous.)	6.3	7.0	7.7	7.4
Payroll (mil. $)	$ 153.5	$ 149.1	$ 147.8	$ 117.1
Value added by manufacture# (mil. $)	427.3	413.0	459.2	380.4
Value of industry shipments## (mil. $)	769.8	753.9	796.1	644.3
Capital expenditures, new (mil. $)	26.5	20.9	19.1	16.4

Sewing Machines (SIC 3636*)	1981	1980	1979	1977
Number of companies	na	na	na	86
Number of establishments, total**	na	87	88	91
Number with 20 or more employees	na	27	24	25
Employees, total (thous.)	6.0	7.5	8.0	8.2
Production workers (thous.)	3.9	5.1	5.6	6.1
Payroll (mil. $)	$ 108.9	$ 118.2	$ 120.3	$ 107.3
Value added by manufacture# (mil. $)	166.9	267.3	251.1	209.5
Value of industry shipments## (mil. $)	309.7	403.3	399.0	305.9
Capital expenditures, new (mil. $)	13.0	15.4	14.5	8.1

(continued)

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

	1981	1980	1979	1977
Household Appliances, n.e.c. (SIC 3639*)				
Number of companies	na	na	na	65
Number of establishments, total **	na	69	68	80
Number with 20 or more employees	na	50	50	40
Employees, total (thous.)	15.4	15.7	17.3	15.7
Production workers (thous.)	12.4	12.6	14.0	12.8
Payroll (mil. $)	$ 265.8	$ 243.2	$ 249.9	$ 195.3
Value added by manufacture# (mil. $)	692.8	622.9	644.9	527.9
Value of industry shipments## (mil. $)	1,462.4	1,411.1	1,424.9	1,184.0
Capital expenditures, new (mil. $)	33.9	23.6	28.2	24.6

na = not available
n.e.c. = not elsewhere classified

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 363 is the composite identifier for the appliance/electric housewares industry. Included in this category is the electric housewares industry (SIC 3634) which is separately covered in this Fact File in the section on electric housewares and personal care appliances.

SIC 3631 comprises establishments primarily engaged in manufacturing household cooking equipment, such as stoves, ranges and ovens, including both electric and non-electric types. Also included in this category are barbeque grills and microwave ovens.

SIC 3632 includes establishments primarily engaged in producing household refrigerators and home and farm freezers.

SIC 3633 includes establishments primarily engaged in manufacturing laundry equipment such as washing machines, wringers, dryers, and ironers for household use. This industry also includes producers of coin-operated washers and driers.

SIC 3635 includes establishments primarily engaged in producing vacuum cleaners for household use.

SIC 3636 includes establishments primarily engaged in manufacturing sewing machines for domestic and industrial use.

SIC 3639 includes establishments primarily engaged in manufacturing household appliances, not elsewhere classified, such as water heaters, dishwashers and food waste disposal units. This industry also includes producers of dishwashing machines, floor waxes and polishers.

**Each business location is counted as a separate establishment. Data for 1979 -- 1981 include only establishments with payrolls, as reported in County Business Patterns.

(footnotes continued)

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

#Value added by manufacture is derived by subtracting the total cost of materials (including materials, supplies, fuel, electric energy, cost of resales and miscellaneous receipts) from the value of shipments (including resales) and other receipts, and adjusting the resulting amount by the net change in finished products and work-in-process inventories between the beginning and end of the year.

##Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. It includes receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It also includes both primary and secondary products made in these industries. The value of shipments of appliances, only, by all producers, including manufacturers making them as secondary products, is covered on pages 11-13.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977; Annual Survey of Manufactures, 1979, 1980, 1981.

The Bureau of Industrial Economics, U.S. Department of Commerce, measures trends in industry in both current and constant dollars, to remove the effects of inflation. On a constant dollar basis, the value of industry shipments in major appliances/electric housewares in 1982 were off over 10% compared with 1981 and, in real terms, 20% below the peak year in 1979. Because of a better-than-expected economic recovery in 1983, and a gain in new housing starts, the Bureau revised its projections on industry shipments for the year at midyear, and anticipated a gain of 18.6% on a current dollar basis, about 14% on a constant dollar basis in the value of industry shipments compared with 1982. (The original projection looked for a constant dollar gain of only 6.8%.)

Data on individual product components within the appliance industry for 1982, and projected for 1983, have not yet been revised. Data below are from the 1983 Industrial Outlook issued in January 1983 and indicators for most products this year are better than expected at that time.

Estimated Value of Industry Shipments, 1982 (Current Dollars) & Growth Rates in Constant (1972) Dollars

Industry	Mils. of Current $ 1982 (p)	Constant (1972) $ % Change 1983/1982(p)	Constant (1972) $ Compound Annual Growth Rate, 1972-1982
Household cooking equipment (SIC 3631)	$ 2,266	+ 8.9%	+ 2.7%
Household refrigerators, freezers (SIC 3632)	2,507	+ 6.0	- 2.9
Household laundry equipment (SIC 3633)	2,088	+ 6.2	- 2.2
Household vacuum cleaners (SIC 3635)	763	+ 5.0	+ 0.6
Sewing machines (SIC 3636)	425	+ 4.6	+ 0.8
Household appliances, n.e.c. (SIC 3639)	1,449	+ 6.5	+ 1.4

(p) preliminary

Source: U.S. Bureau of Industrial Economics, 1983 U.S. Industrial Outlook (January 1983)

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

Employment & Earnings

Bureau of Labor statistics data for the first eight months of 1983 show total employment in the major appliance industry up less than 1% compared with the same 1982 period; however, production worker employment gained 1.8%

Employment in the household laundry equipment segment gained a strong 16.2% in the first eight months this year, while in the household refrigerators/freezers segment employment averaged about 11% below the same period of 1982.

Employment & Earnings in the Major Appliance & Electric Housewares Industry

	January-August Average			Annual Averages		% Change
	1983(p)	1982	% Change 1982/1981	1982	1981	1982/1981
Household Appliances (SIC 363) (Includes Electric Housewares)						
All employees (thous.)	143.7	143.0	+ 0.5%	141.3	161.0	- 12.2%
Production workers (thous.)	111.6	109.6	+ 1.8	108.3	127.2	- 14.9
Avg. weekly earnings	$331.89	$298.82	+ 11.1	$305.56	$294.10	+ 3.9
Avg. hourly earnings	8.49	7.95	+ 6.8	8.02	7.58	+ 5.8
Avg. weekly hours	39.1	37.6	+ 4.0	38.1	38.8	- 1.8
Household refrigerators & freezers (SIC 3632)						
All employees (thous.)	24.5	27.5	- 10.9	26.1	32.7	- 20.2
Production workers (thous.)	19.4	21.8	- 11.0	20.5	26.6	- 22.9
Avg. weekly earnings	$381.03	$355.49	+ 7.2	$360.68	$348.48	+ 3.5
Avg. hourly earnings	9.58	9.23	+ 3.8	9.32	8.80	+ 5.9
Avg. weekly hours	39.8	38.5	+ 3.4	38.7	39.6	- 2.3
Household laundry equipment (SIC 3633)						
All employees (thous.)	23.0	19.8	+ 16.2	19.4	21.4	- 9.3
Production workers (thous.)	17.8	14.9	+ 19.5	14.4	16.7	- 13.8
Avg. weekly earnings	$397.47	$352.20	+ 12.8	$360.68	$348.48	+ 3.5
Avg. hourly earnings	10.05	9.47	+ 6.1	9.32	8.80	+ 5.9
Avg. weekly hours	39.5	37.2	+ 6.2	38.7	39.6	- 2.3

(p) = preliminary.

NOTE: BLS data on employment totals differs from Census Bureau data due to a difference in methodology in computing the figures. Separate employment and earnings statistics for the electric housewares industry only is covered in the electric housewares section of this Fact File.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

Concentration in the Industry

The Household Appliance Industry (SIC 363)
By Employment Size, 1981
(Includes only establishments with payrolls)

	Household Appliances (SIC 363)		Household Cooking Equipment (SIC 3631)		Household Refrigerators & Freezers (SIC 3632)		Household Laundry Equipment (SIC 3633)	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total
Total plants	604	100.0%	77	100.0%	40	100.0%	29	100.0%
Number by employment size:								
Under 20 employees	257	42.5	20	26.0	11	27.5	4	13.8
20-99 employees	131	21.7	17	22.1	11	27.5	8	27.6
100-499 employees	130	21.5	25	32.5	5	12.5	7	24.1
500 or more employees	86	14.2	15	19.5	13	32.5	10	34.5

	Household Vacuum Cleaners (SIC 3635)		Sewing Machines (SIC 3636)		Household Appliances, n.e.c. (SIC 3639)	
	Number	% of Total	Number	% of Total	Number	% of Total
Total plants	29	100.0%	93	100.0%	76	100.0%
Number by employment size:						
Under 20 employees	9	31.0	66	71.0	25	32.9
20-99 employees	11	37.9	17	18.3	19	25.0
100-499 employees	6	20.7	6	6.4	18	23.7
500 or more employees	3	10.3	4	4.3	14	18.4

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census, County Business Patterns 1981

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

Location of the Industry

States Leading in Major Appliance/Electric Housewares Industry Shipments, 1978

	Employment (Thous.)	Millions of $ Value Added by Mfr.	Millions of $ Value of Shipments
U.S. Industry, total	168.0	$ 5,472.2	$ 11,487.5
Arkansas	4.6	153.2	341.3
California	5.3	148.1	311.6
Connecticut	3.5	137.1	215.9
Illinois	20.7	533.0	1,149.6
Indiana	12.4	398.7	945.6
Kentucky	3.4	132.4	298.5
Michigan	6.2	191.7	457.5
Minnesota	4.5	129.0	327.1
Missouri	4.5	95.0	204.8
New Jersey	5.2	100.8	174.0
New York	3.4	116.5	196.2
North Carolina	6.0	179.9	334.9
Ohio	27.3	1,077.8	2,239.9
Pennsylvania	4.1	122.2	256.5
South Carolina	3.9	95.3	219.0
Tennessee	12.2	332.8	765.2
Wisconsin	8.5	247.4	517.2

Source: U.S. Bureau of the Census,
1978 Annual Survey of Manufactures (M78-AS-6)

MAJOR APPLIANCE SHIPMENTS

According to the Association of Home Appliance Manufacturers and the Gas Appliance Manufacturers Association, unit shipments of major appliances in the first nine months of 1983 jumped 16.7% over the year-ago level. This was well ahead of the 6.4% increase for 1983 projected by the AHAM in late 1982.

Shipments of built-in dishwashers led the increase with a 44.5% gain, a result of increased home construction activity. Microwave oven and range shipments were also strong in the January to September period, rising 43.1% over the same 1982 period.

Unit Shipments of Major Home Appliances,
January - September 1982, 1983
(Thousands of Units)

	January - September 1983	January - September 1982	% Change 1983/1982
Total shipments*	29,945.9	25,664.7	+ 16.7%
Room air conditioners	1,818.9	2,571.9	- 29.3
Dehumidifiers	427.7	429.3	- 0.4

(continued)

MAJOR APPLIANCE SHIPMENTS

Unit Shipments of Major Home Appliances, January - September 1982, 1983

(Thousands of Units)
(continued)

	January - September		% Change
	1983	1982	1983/1982
Dishwashers	2,235.6	1,567.4	+ 42.6%
Built-in	2,050.5	1,418.8	+ 44.5
Portable	185.1	148.6	+ 24.6
Disposers	2,618.2	1,952.7	+ 34.1
Compactors	112.1	107.3	+ 4.5
Refrigerators	4,090.2	3,390.1	+ 20.7
Freezers	1,053.7	1,107.8	- 4.9
Upright	485.1	502.3	- 3.4
Chest	568.6	605.4	- 6.1
Electric ranges	2,021.4	1,463.5	+ 38.1
Free standing	1,610.1	1,161.1	+ 38.7
Built-in	411.3	302.4	+ 36.0
Gas ranges	1,150.9	1,014.4	+ 13.5
Free standing	1,020.1	901.4	+ 13.2
High oven	62.8	54.2	+ 15.9
Built-in	68.0	58.8	+ 15.6
Microwave ovens/ranges**	3,923.9	2,742.0	+ 43.1
Clothes washers	3,534.4	3,101.6	+ 14.0
Automatic	3,480.3	3,052.9	+ 14.0
Wringer & other	54.2	48.7	+ 11.3
Clothes dryers	2,408.4	2,022.5	+ 19.1
Electric	1,921.4	1,589.4	+ 20.9
Gas	486.9	433.1	+ 12.4
Water heaters	4,699.3	4,322.0	+ 8.7
Electric	2,329.6	2,033.8	+ 14.5
Gas	2,369.8	2,288.2	+ 3.6

* Individual categories will not add to the total because of overlapping product categories.

** Includes imported microwave ovens and combination microwave ovens/ranges.

Source: Association of Home Appliance Manufacturers and the Association of Gas Appliance Manufacturers (September 1983).

Trends

In the 1983 U.S. Industrial Outlook, the Bureau of Industrial Economics estimated the 1982 value of shipments of household appliances (including electric housewares) at $12.2 billion, 3.2% less than the estimated 1981 value. Measured in constant 1972 dollars, which eliminates inflation's effects, 1983 shipments rose 6.9% ahead of the prior year. These figures are product shipments as opposed to industry shipments, and cover the value of specified products by all producers, regardless of industry classification, and not including other receipts.

MAJOR APPLIANCE SHIPMENTS

Trends

Estimated Shipment Value of Major Appliances by All U.S. Producers, In Current Dollars, 1981, 1982 & Constant Dollar 1983 Projections

	Current $		Constant (1972) $	
Products	1982(e)	1981(e)	% Change in Shipment Value 1983/1982	Compound Annual Growth Rate 1972-1982
Household appliances, total *	$ 9,245	9,539.4	na	na
Household cooking equipment	2,140	2,407.5	+ 9.2%	+ 1.2%
Household refrigerators, freezers	2,244	2,400.4	+ 6.3	- 2.1
Household laundry equipment	1,750	1,866.0	+ 6.3	- 3.4
Vacuum cleaners	828	869.9	+ 5.2	+ 2.0
Sewing machines	334	346.4	+ 3.7	- 1.2
Household appliances, n.e.c.	1,949	1,649.2	+ 6.7	+ 0.9

na = not available
n.e.c. = not elsewhere classified. Includes dishwashers, water heaters, trash compactors, etc.
(e) = estimated. Data for 1982 are preliminary and an upward revision in projected 1983 data is expected.
* Does not include air conditioners.

Source: U.S. Bureau of Industrial Economics
1983 U.S. Industry Outlook.

In addition to the annual surveys of manufactures reports previously covered, the Bureau of the Census issues annual reports covering the quantity and value of shipments of major household appliances and electric housewares. Product data is much more detailed than available through the annual surveys of manufactures.

The detailed data is compiled by the Bureau through a mail survey among all known manufacturers--approximately 114 major appliance companies and 140 electric housewares companies in the U.S.--and issued in the Current Industrial Reports series.

CIR data on major appliance shipments for 1981 and 1982 are covered in the following table.

MAJOR APPLIANCE SHIPMENTS

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1981, 1982

	Total Number of Companies	Quantity (Thous. Units)		Value (Mil. $)		
	1982	1982	1981(r)	1982	1981(r)	% Change 1982/1981
Electric ranges, ovens & surface cooking units, incl. parts	28	na	na	$1,537.9	$1,698.5	- 9.5%
Free-standing ranges:						
Under 23", incl. apt. house type	9	103.3	128.4	17.5	20.1	- 12.9
23" to 32"						
Low oven, incl. slide-ins	13	1,306.2	1,397.7	343.5	347.8	- 1.2
High ovens	2	44.4	85.3	69.0	46.8	+ 47.4
High-low ovens	11					
33" & over	6	29.9	36.0	11.4	12.3	- 7.3
Built-in ovens						
Single oven	14	236.4	250.2	62.2	63.0	- 1.3
Two oven	11	45.4	66.1	25.5	29.5	- 13.6
Surface cooking tops	14	291.9	374.4	46.2	57.4	- 19.5
Drop-in ranges	9	192.0	249.8	60.6	72.6	- 16.5
Microwave ranges & ovens, excl. portables	10	149.3	209.6	121.4	151.7	- 20.0
Microwave ovens, portable	13	2,612.2	2,890.8	656.1	767.0	- 14.5
Electric ranges, n.e.c., incl. parts & accessories sold separately	na	na	na	na	na	--
Gas household ranges, ovens & surface cooking units, incl. parts	17	na	na	389.0	402.7	- 3.4
Standard type, free-standing:						
Over 32" cooking top & oven	10	100.4	125.3	32.7	37.2	- 12.1
Over 24" to 32" cooking top & oven	10	820.0	913.5	219.2	225.6	- 2.8
Apt. ranges, 24" cooking top & under	9	158.4	180.2	28.2	27.5	+ 2.5
Standard type, for built-in installation	10	111.0	116.4	28.6	32.1	- 10.5
Surface cooking tops	9	114.6	139.1	16.6	16.2	+ 2.5
Nonstandard types:						
Wall hung	3	2.5	141.7	0.8	29.4	+ 9.9
Slide-in or drop-in	8	146.9		31.5		
Hot plates	2	22.6	33.3	10.8	17.0	- 36.5
Gas household ranges, ovens & surface cooking units, n.e.c.	5					
Parts & accessories sold separately	13	na	na	20.6	17.7	+ 16.4

(continued)

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1981, 1982

(continued)

	Total Number of Companies	Quantity (Thous. Units)		Value (Mil. $)		
	1982	1982	1981(r)	1982	1981(r)	1982/1981
Other household ranges & cooking equipment (excl. gas & electric) & outdoor cooking equipment, incl. parts & accessories	37	na	na	$ 365.4	$ 340.5	+ 7.3%
Barbequers, grills, etc., for outdoor cooking						
Permanently installed units	na	168.7	168.5	8.1	9.0	- 10.0
Portable units						
Solid fuel (charcoal, etc.)	19	6,512.9	7,227.4	97.0	100.1	- 3.1
Gasoline, white gas, kerosene type	3	531.0	569.9	16.8	17.7	- 5.1
Other fuel (propane, etc.)	19	2,191.9	1,835.2	221.0	192.2	+ 15.0
Parts and accessories sold separately	na	na	na	22.5	21.5	+ 4.6
Household refrigerators, incl. refrigerator-freezer combinations	17	4,587.0	5,408.7	1,761.8	1,946.5	- 9.5
Complete units:						
9.4 cubic ft. & under	na	330.1	356.9	54.6	48.5	+ 12.6
9.5 to 12.4 cubic ft.	na	313.0	419.5	78.5	97.5	- 19.5
12.5 to 14.4 cubic ft.	na	822.0	1,131.2	237.6	307.4	- 22.7
14.5 to 17.4 cubic ft.	na	1,391.7	1,377.8	497.4	467.6	+ 6.4
17.5 to 19.4 cubic ft.	na	799.4	988.9	330.6	389.3	- 15.1
19.5 cubic ft. & larger	6	887.4	1,089.6	537.1	612.2	- 12.3
Range-refrigerator and/or sink combinations	5	43.4	44.8	26.0	24.0	+ 8.3
Food freezers, complete units, household type	9	1,277.5	1,660.9	308.8	379.0	- 18.5
10.4 cubic ft & under	na	385.0	489.6	78.0	85.0	- 8.2
10.5 to 17.4 cubic ft.	na	535.0	706.9	130.0	168.0	- 22.6
17.5 to 21.4 cubic ft.	na	254.8	325.7	70.7	86.5	- 18.3
21.5 cubic ft. & larger	na	102.7	138.7	30.1	39.5	- 23.8
Household mechanical washing machines, dryers & washer-dryer combinations	9	6,730.2	7,445.5	1,530.4	1,603.8	- 4.6
Washing machines, mechanical, incl. those with dishwasher attachments:						
Standard size, electrically driven, automatic & semiautomatic, excl. coin-operated	6	3,946.4	4,374.9	1,000.0	1,051.3	- 4.9
Nonautomatic, wringer type, spinner type & all other, incl. gas-driven & small size	na	68.7	106.0	16.7	23.9	- 30.1
Dryers, mechanical						
Gas	6	587.0	653.7	125.6	132.7	- 5.3
Electric	7	2,128.1	2,310.9	388.1	395.9	- 2.0

(continued)

MAJOR APPLIANCE SHIPMENTS

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1981, 1982
(continued)

	Total Number of Companies	Quantity (Thous. Units)		Value (Mil. $)		
	1982	1982	1981(r)	1982	1981(r)	% Change 1982/1981
Household dishwashing machines, food waste disposers, floor waxing machines & trash compactors	23	na	na	$ 674.4	$ 776.4	- 13.1%
Dishwashing machines:						
Portable, incl. convertible type	7	283.4	418.3	66.4	87.8	- 24.4
Built-in type	7	1,866.1	2,215.2	398.0	454.6	- 12.4
Floorwaxing, polishing, scrubbing & shampooing machines (for household use only)	5	435.1	396.9	25.3	23.1	+ 9.5
Food waste disposers	8	2,664.6	3,061.3	114.1	126.3	- 9.7
Household trash compactors	7	148.1	194.4	31.5	39.1	- 19.4
Parts & accessories for other household type appliances, sold separately	10	na	na	39.1	45.5	- 14.1
Water heaters, electric	13	2,955.6	3,204.9	286.5	290.5	- 1.4
Storage type:						
44 gallons & under	na	1,715.3	2,069.7	150.6	152.7	- 1.4
45 to 54 gallons	9	856.5	792.4	88.1	85.9	+ 2.6
55 gallons & over, & all other types, incl. circulating & portable storage	na	383.8	342.8	47.8	51.9	- 7.9

na = not available
(r) = revised.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Major Household Appliances MA-36F(82)-1.

In addition to the specific appliances covered in the preceding table, the Census Bureau issues Current Industrial Reports on other types of appliances including air conditioners, dehumidifiers and certain types of heaters, as reported in the following tables.

MAJOR APPLIANCE SHIPMENTS

Air Conditioners/Dehumidifiers

Shipments of room air conditioners fell sharply in 1982 primarily because of the generally cool summer weather over much of the U.S. In value, shipments were down 18.1% to $818.3 million, with units shipped off 22.6% compared with 1981.

Quantity & Value of Shipments of Room Air Conditioners & Dehumidifiers by All U.S. Producers, 1980, 1981

	Quantity (Thous. Units)		% Change	Value (Mil. $)		% Change
	1982	1981	1982/1981	1982	1981	1982/1981
Room air conditioners, total	2,880.8	3,722.5	- 22.6%	$ 818.3	$ 999.7	- 18.1%
5,999 btu/hr. & under	635.0	765.9	- 17.1	109.3	118.0	- 7.4
6,000-6,999 btu/hr.	115.2	164.7	- 30.0	25.5	33.3	- 23.4
7,000-7,999 btu/hr.	241.4	328.9	- 26.6	55.0	69.5	- 20.9
8,000-8,999 btu/hr.	136.4	168.8	- 19.2	34.3	40.6	- 15.6
9,000-9,999 btu/hr.	173.0	223.8	- 22.7	49.2	60.2	- 18.3
10,000-12,999 btu/hr.	502.6	606.3	- 17.1	148.9	167.6	- 11.2
13,000-19,999 btu/hr.	774.2	990.6	- 21.8	264.2	322.0	- 17.9
20,000 btu/hr. & over	303.0	473.2	- 36.0	131.8	188.5	- 30.0
Electrically operated dehumidifier mechanically refrigerated, self-contained	409.0	540.4	- 24.3	66.8	81.5	- 18.0

Source: U.S. Bureau of the Census
Current Industrial Reports
Air-Conditioning & Refrigeration Equipment
MA-35M(82)-1

Heating Stoves

Quantity & Value of Shipments of Heating Stoves By All U.S. Producers, 1980, 1981

	Quantity (Thous. Units)		% Change	Value (Mil. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Domestic heating stoves, total	1,218.6	1,735.5	- 29.8%	$ 252.6	$ 363.0	- 30.4%
Gas	217.3	318.6	- 31.8	32.5	43.3	- 24.9
Wood, total	483.0	717.1	- 32.6	96.6	142.6	- 32.3
Sheet-metal airtight type	279.1	420.1	- 33.6	41.8	74.5	- 43.9
All other wood types	203.9	297.0	- 31.3	54.7	68.1	- 19.7

(continued)

MAJOR APPLIANCE SHIPMENTS

Heating Stoves

Quantity & Value of Shipments of Heating Stoves By All U.S. Producers, 1980, 1981 (continued)

Domestic heating stoves (cont'd.)	Quantity (Thous. Units) 1981	Quantity (Thous. Units) 1980	% Change 1981/1980	Value (Mil. $) 1981	Value (Mil. $) 1980	% Change 1981/1980
Coal, exc. sheet-metal airtight	28.5	52.7	- 45.9%	$ 6.7	$ 11.1	- 39.6%
Fireplace inserts	297.9	416.5	- 28.5	100.7	150.3	- 33.0
Kerosene, gasoline, fuel oil	210.0	230.6	- 8.9	16.1	15.6	+ 3.2
Air space heaters						
Portable room heaters						
Fan-forced type	2,876.9	3,300.7	- 12.8	56.3	68.1	- 17.3
Other fan	1,320.0	1,035.8	+ 27.4	27.1	25.0	+ 8.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Selected Heating Equipment,
MA34N(81)-1.

Floor Care

The Bureau of Industrial Economics estimated the value of shipments of vacuum cleaners in 1982 at $828.0 million, down 4.8% compared with the 1981 total. Quantity of shipments has not been reported by the Census Bureau since the 1977 Census. In that year, a total of 3.7 million upright-type electric vacuums and 2.7 million of other types (tank, etc.) were shipped by U.S. manufacturers.

Value of Shipments of Vacuum Cleaners, 1977-1982 (Millions of Dollars)

1982	1981	1980	1979	1978	1977
$828.0	$869.9	$817.1	$860.2	$710.4	$439.2

Source: U.S. Bureau of Industrial Economics,
1983 U.S. Industrial Outlook.

Merchandising magazine estimated U.S. apparent consumption of vacuum cleaners at 8.7 million units in 1983. Upright vacuums accounted for 52.4% of the total supply, but lightweight vacuums showed the largest growth in percentage terms (+16.1% over 1982).

MAJOR APPLIANCE SHIPMENTS

Apparent Consumption of Floor Care Products, 1982 & 1983 Projections

	Apparent Consumption (Thous. Units)		
	1983	1982	% Change 1983/1982
Vacuum cleaners, total	8,693	7,603	+ 14.3%
Cannister	2,742	2,401	+ 14.2
Upright	4,557	4,001	+ 13.9
Lightweight, total	1,394	1,201	+ 16.1
Hand-held	394	251	+ 57.0
Sticks	1,000	950	+ 5.3
Carpet sweepers	1,727	1,571	+ 9.9
Floor polishers	200	209	- 4.3

Source: Merchandising Magazine,
"Ninth Annual Housewares Statistical &
Marketing Report" September 1983

Household Sewing Machines

Figures on quantity of shipments of sewing machines for household use are not available. In 1982, according to the Bureau of Industrial Economics, shipments by U.S. manufacturers were valued at $334.0 million, down 3.6% compared with the 1981 total.

Value of Shipments of Sewing Machines, 1977-1982 (Millions of Dollars)

1982	1981	1980	1979	1978	1977
$334.0	$346.4	$328.4	$323.2	$260.4	$152.1

Source: U.S. Bureau of Industrial Economics,
1983 U.S. Industrial Outlook.

Concentration Levels

Share of Specified Major Appliance Shipments Accounted For By the Top 50 Companies, 1977

	Value of Shipments* (Mil. $)	Percent of Shipment Value Accounted For By:			
		Top 4 Companies	Top 8 Companies	Top 20 Companies	Top 50 Companies
Household cooking equipment	$1,806.5	44%	66%	86%	98%
Electric household ranges, ovens & surface cooking units	1,232.5	57	79	98	100
Gas ranges, ovens & surface cooking units	349.1	59	82	98	100

(continued)

MAJOR APPLIANCE SHIPMENTS

Concentration Levels

Share of Specified Major Appliance Shipments Accounted For By the Top 50 Companies, 1977
(continued)

	Value of Shipments* (Mil. $)	Percent of Shipment Value Accounted For By: Top 4 Companies	Top 8 Companies	Top 20 Companies	Top 50 Companies
Household refrigerators & freezers	$2,005.6	82%	97%	99%	100%
Household refrigerators, incl. combination refrigerator-freezers	1,644.4	83	na	100	
Home & farm freezers	296.0	83	na	100	
Household laundry equipment	1,697.3	83	97	99	100
Household mechanical washing machines, dryers & combinations	1,460.3	85	99	100	
Household vacuum cleaners, incl. parts & attachments	710.4	69	88	99	100
Sewing machines	260.4	82	89	94	99
Household appliances, n.e.c.	1,383.0	46	72	94	99
Household water heaters, electric	222.5	78	98	100	
All other water heaters	281.6	81	99	100	
Dishwashers, disposals, trash compactors, floor waxing/polishing machines	721.8	73	90	99	100

* Value of shipments from all U.S. producers, not just those classified in the industry.
na = not available.
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Concentration Ratios in Manufacturing (MC77-SR9).

Manufacturers' Share of Total Shipment Value of Specified Major Appliances, 1981, 1982

Room Air Conditioners	1982	1981
General Electric	22%	28%
White	16	10
Whirlpool (Heil-Quaker)	10	18
Fedders	7	8
Carrier	6	7
Addison	5	5
Emerson Quiet Kool	5	5
All others	29	19

Freezers	1982	1981
Whirlpool	33%	22%
White Consolidated (Frigidaire, Gibson, White Westinghouse, Kelvinator)	29	26
Admiral	24	25
Raytheon (Amana)	9	14
All others	5	3

(continued)

MAJOR APPLIANCE SHIPMENTS

Concentration Levels

Manufacturers' Share of Total Shipment Value of Specified Major Appliances, 1981, 1982
(continued)

Trash Compactors	1982	1981
Whirlpool	47%	45%
GE/Hotpoint	30	30
Hobart (Kitchen Aid)	9	10
Tappan	6	6
All others	8	9

Dishwashers	1982	1981
Design & Manufacturing	38	45
GE/Hotpoint	22	15
Whirlpool	15	7
Hobart (Kitchen Aid)	14	18
Maytag	7	12
All others	4	3

Ranges/Ovens, Built-In Microwave	1982	1981
GE	31	20
Litton	16	16
Raytheon (Amana, Caloric, Modern Maid, Sunray/Glenwood)	14	10
Whirlpool	12	6
Magic Chef	7	7
Roper	7	15
All others	13	26

Clothes Dryers, Gas	1982	1981
Whirlpool	45	46
GE/Hotpoint	17	13
Maytag	15	20
White Consolidated (Frigidaire, Gibson, White-Westinghouse, Kelvinator)	15	14
All others	8	7

Refrigerators	1982	1981
GE/Hotpoint	30	29
Whirlpool	29	28
White Consolidated (Frigidaire, Gibson, White-Westinghouse, Kelvinator)	24	23
Admiral	11	9
All others	6	11

Food Waste Disposers	1982	1981
In-Sink-Erator	58%	25%
GE/Hotpoint	17	35
Tappan	9	15
Thermador/Waste King	9	--
All others	7	25

Microwave Ovens	1982	1981
GE/Hotpoint	15	12
Raytheon (Amana)	13	13
Litton	12	15
Sharp	12	10
Sanyo	10	20
Tappan	9	10
All others	29	20

Ranges/Ovens, Gas	1982	1981
Magic Chef (Gaffers & Sattler)	21	25
Raytheon (Caloric, Sunray, Modern Maid, Sunray/Glenwood)	19	25
Tappan	19	17
Roper	12	14
Hardwich	9	9
All others	20	10

Clothes Dryers, Electric	1982	1981
Whirlpool	45	46
GE/Hotpoint	18	15
Maytag	15	20
White Consolidated (Frigidaire, Gibson, White-Westinghouse, Kelvinator)	15	14
All others	7	5

Clothes Washers	1982	1981
Whirlpool	45	43
GE/Hotpoint	19	15
Maytag	16	20
White Consolidated (Frigidaire, Gibson White-Westinghouse, Kelvinator)	15	14
All others	5	8

Source: Appliance Manufacturers Magazine
"Seventh Annual Marketing Guide"
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FOREIGN TRADE IN MAJOR APPLIANCES

Imports

Imports do not have a significant effect on the U.S. appliance market. They accounted for only 8.0% of the total new supply of major appliances in the U.S. in 1982, according to the Bureau of Industrial Economics. In value, 1982 appliance imports rose 5.6% to $1.2 billion, but this figure includes electric housewares imports. Available information from the Census Bureau indicates that major appliance imports totaled approximately $410 million in 1982.

Microwave oven imports represented half of the major appliance import value. At $206.3 million in 1982, this was down 6.7% from 1981. Refrigerator imports were valued at $56.1 million, up 12.0% over a year ago. The import value of electric stoves and ranges slid 14.8% to $102.4 million in 1982. Major foreign suppliers of household appliances are Japan, Hong Kong, Taiwan and Singapore.

Barriers to the importation of major appliances from other countries include the limited local demand in their home markets, the heavy capital expenditures required to manufacture them and the high cost of transportation.

Exports

The export value of major appliances declined a substantial 27.3% to $557.7 million in 1982, according to the Census Bureau. Exports in units were off 26.5%. The decline was attributed to the poor economic situation worldwide, which prompted many families to postpone major appliance purchases. Export markets include Canada, Saudi Arabia, Venezuela, England and West Germany.

Exports of Major Appliances

Quantity & Value of U.S. Exports of Specified Major Appliances
1981, 1982

	Quantity (Thous. Units)			Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Major appliances, total	3,136.5	4,286.8	- 26.8%	$557.7	$767.3	- 27.3%
Kitchen & related appliances, total	2,106.0	2,750.0	- 23.4	278.7	375.9	- 25.9
Refrigerators & refrigerator-freezers, household type, total	247.2	329.5	- 25.0	129.1	172.4	- 25.1
Under 13.5 cubic feet	68.0	81.4	- 16.5	30.7	34.1	- 10.0
Over 13.5 cubic feet	179.2	248.1	- 27.8	98.4	138.3	- 28.8
Freezers, household type	30.0	48.6	- 38.3	15.6	26.4	- 40.9
Microwave ovens, household type	68.6	122.9	- 44.2	19.3	33.8	- 42.9
Household cooking apparatus, exc. portable, of base metal	120.7	130.0	- 7.1	17.6	20.9	- 15.8
Domestic heating stoves, of base metal	97.6	101.3	- 3.6	9.9	11.7	- 15.4
Electric cooking stoves & ranges, household type, nspf	80.9	92.7	- 12.7	27.9	27.9	--

(continued)

FOREIGN TRADE

Exports of Major Appliances

Quantity & Value of U.S. Exports of Specified Major Appliances
1981, 1982
(continued)

	Quantity (Thous. Units)			Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Nonportable cooking & food warming appliances, nspf	636.4	649.6	- 2.0%	$ 23.9	$ 25.4	- 5.9%
Nonportable electrothermic kitchen & household appliances, nspf	645.1	1,048.1	- 38.4	13.1	24.9	- 47.4
Dishwashers, household type	52.3	78.1	- 33.0	13.1	17.0	- 22.9
Food waste disposers, electro-mechanical	127.2	149.2	- 14.7	9.2	10.2	- 9.8
Laundry equipment, total	176.6	197.8	- 10.7	51.2	54.9	- 6.7
Washing machines, exc. commercial & industrial	128.8	141.5	- 9.0	39.0	40.9	- 4.6
Clothes dryers, household types	47.8	56.3	- 15.1	12.2	14.0	- 12.9
Air conditioners, window & wall types, total	480.1	712.9	- 32.7	177.8	263.6	- 32.5
Under 10,000 BTU/hr.	90.6	144.7	- 37.4	33.1	46.5	- 28.8
10,000-16,999 BTU/hr.	122.3	218.7	- 44.1	45.3	80.8	- 43.9
17,000 BTU/hr. & over	267.2	349.5	- 23.5	99.4	136.3	- 27.1
Vacuum cleaners, electro-mechanical	326.6	557.6	- 41.4	32.3	48.0	- 32.7
Floor polishers, electro-mechanical & parts thereof	--	--	--	10.5	15.3	- 31.4
Gas water heaters	47.2	68.5	- 31.1	7.2	9.6	- 25.0

na = not available
nspf = not specially provided for.
* Value is equivalent to f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the carrier as well as freight, insurance and any other charges or transportation costs beyond the port of exportation.

Source: U.S. Dept. of Commerce
U.S. General Exports FT 410
December 1981, 1982

FOREIGN TRADE

Import Penetration

Total Apparent Consumption of Selected Major Appliances in the U.S., 1982
& Imports' Share of the Total

	Apparent U.S. Consumption*		Imports % To Total Apparent U.S. Consumption	
	Quantity (Thous.)	Value (Mil. $)	Quantity	Value
Microwave ranges, ovens	3,800.9	$ 927.7	29%	22%
Refrigerators & combination refrigerator-freezers	4,995.7	1,721.9	13	4
Food freezers, household type	1,335.5	312.7	7	5
Washing machines, household type	3,885.4	983.8	1	**

* Apparent consumption equals U.S. production less exports plus imports.
**Less than 0.5%.

Source: U. S. Bureau of the Census, Current Industrial Reports, Major Household Appliances, 1982 (MA36F)

PRODUCER PRICES

Household appliance prices at the factory level jumped 3.1% in the twelve month period ended August 1983, almost double the overall increase in the producer price index. Major appliance producer prices were up an even higher 3.5%. This follows a 7.3% increase in major appliance prices in 1982 compared with a 2.0% gain for all commodities.

Producer (Factory) Price Indexes For Specified Major Appliances
1981, 1982 & August 1982, 1983
(1967=100 unless otherwise indicated)

	August			Annual Averages		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
All commodities	304.9	300.2	+ 1.6%	299.3	293.4	+ 2.0%
Household appliances	207.3	201.0	+ 3.1	199.1	187.3	+ 6.3
Major appliances	212.2	205.1	+ 3.5	202.6	188.8	+ 7.3
Cooking equipment	227.0	219.2	+ 3.6	216.1	203.5	+ 6.2
Free-standing electric ranges	243.8	231.5	+ 5.3	225.2	203.4	+ 10.7
Built-in surface cooking tops, electric	229.9	214.0	+ 7.4	na	190.0	--
Portable microwave ovens (12/78=100)	na	99.8	--	99.6	103.4	- 3.7
Drop-in electric ranges	113.8	111.4	+ 2.1	110.2	na	--
Free-standing gas ranges	255.0	245.1	+ 4.0	240.0	227.2	+ 5.6
Surface cooking tops, gas (6/81=100)	113.9*	106.8*	+ 6.6	107.7	102.5	+ 5.1
Nonstandard type gas ranges (6/81=100)	116.5	112.8	+ 3.3	111.0	103.3	+ 7.4

(continued)

PRODUCER PRICES

Producer (Factory) Price Indexes For Specified Major Appliances
1981, 1982 & August 1982, 1983
(1967 = 100 unless otherwise indicated)
(continued)

	August			Annual Averages		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
Laundry equipment	214.7	208.9	+ 2.8%	206.2	192.8	+ 7.0%
Washing machines, automatic	205.1	199.5	+ 2.8	196.8	184.8	+ 6.5
Electric dryers	233.2	226.7	+ 2.9	223.6	207.0	+ 8.0
Gas dryers (6/80=100)	na	114.4	--	113.9	104.7*	+ 8.8
Refrigeration equipment	203.9	199.0	+ 2.5	196.1	180.6	+ 8.6
Refrigerator-freezer, 14.4 cubic feet & under (12/81=100)	108.9	108.3	+ 0.6	106.8	na	--
Home freezer, upright type	205.3	199.7	+ 2.8	198.4	185.1**	+ 7.2
Other major appliances	196.7	186.0	+ 5.7	185.6	175.5	+ 5.7
Room air conditioners	176.4	164.9	+ 7.0	na	158.0	--
Dishwasher, undercounter	192.6	187.7	+ 2.6	186.7	173.9	+ 7.4
Food waste disposers	na	196.2	--	195.8	182.4	+ 7.3
Sewing machines, portable type, imported head	191.9	188.8	+ 1.6	189.3	177.3	+ 6.8
Vacuum cleaners, including parts & attachments	162.0	162.5	- 0.3	161.4	154.8	+ 4.3

na = not available
* Index for July, not August.
**Index based on the first 9 months of the year.

Source: U.S. Bureau of Labor Statistics

THE CONTRACT MARKET FOR MAJOR APPLIANCES

In 1982, 93% of all new one family homes came equipped with a stove, 84% contained a dishwasher and 16% had refrigerators, up from 11% in 1978. The North Central region of the U.S. was less likely to build homes with stoves and dishwashers in 1982 (only 69%) but slightly more likely to have a refrigerator (22%).

Selected Appliances Included in the Sale Price of New One Family Houses, By Region 1981, 1982

	1982		1981		1978
	Number of Houses (Thous.)	% of Total	Number of Houses (Thous.)	% of Total	% of Total
U.S. total	412	100%	436	100%	100%
Appliances:					
Stove	382	93	398	91	92
Dishwasher	346	84	359	82	84
Refrigerator	66	16	67	15	11
Northeast, total	47	100	46	100	100
Appliances:					
Stove	43	93	41	90	91
Dishwasher	33	70	33	71	75
Refrigerator	11	24	9	20	16
North Central, total	48	100	60	100	100
Appliances:					
Stove	33	69	40	66	69
Dishwasher	33	69	38	63	68
Refrigerator	10	22	11	18	13
South, total	219	100	219	100	100
Appliances:					
Stove	209	96	209	95	97
Dishwasher	194	89	191	87	89
Refrigerator	38	17	41	19	17
West, total	99	100	112	100	100
Appliances:					
Stove	96	97	108	96	98
Dishwasher	86	87	98	88	89
Refrigerator	6	6	6	5	3

Source: U.S. Bureau of the Census, Characteristics of New Housing: 1982, C25-80-13.

Selected Appliances Included in New One-Family Houses By Sales Price, 1982

	Percent of Houses Sold With:		
	Stoves	Dishwashers	Refrigerators
Sale price of house:			
Under $50,000	76%	45%	9%
$50,000-$59,999	93	80	13
$60,000-$79,999	95	91	13
$80,000-$99,999	98	95	19
$100,000-$119,999	na	na	19
$120,000 & over	na	na	27

(continued)

THE CONTRACT MARKET FOR MAJOR APPLIANCES

Selected Appliances Included in New One-Family Houses By Sales Price, 1982
(continued)

	Percent of Houses Sold With:		
	Stoves	Dishwashers	Refrigerators
Average price of house:			
With specified appliance	$85,900	$89,500	$98,500
Without specified appliance	57,600	55,100	81,000
Median price of house:			
With specified appliance	70,700	73,500	79,700
Without specified appliance	49,400	49,000	68,200

Source: U.S. Bureau of the Census,
Characteristics of New Housing: 1982,
C25-80-13.

In addition to the new-house market for major appliances, a large market also exists, of course, in motels, hospitals, schools and other institutions. This Fact File is, however, concerned with the household market for home appliances and does not cover these contract markets.

THE REPLACEMENT MARKET FOR MAJOR APPLIANCES

The following estimates of the service-life expectancy, under one owner, for selected major appliances are the largest available statistics developed by the U.S. Department of Agriculture, Agricultural Research Service. The information was collected from a national sample of about 12,000 households in 1972.

The table indicates how long, on the average, households kept appliances, not how long the appliances could be made to last. Comparisons to estimates developed by the U.S.D.A. in 1957 through 1961 show that the service-life for most items acquired new remained the same. Service-life expectancy of items acquired used was slightly less in 1972 than in the 1957-1961 period.

Length of Time the Average Household Keeps a Major Appliance
(Years)

	Life-Expectancy of Major Appliance	
	Obtained New	Obtained Used
Major appliance		
Freezer	20	9
Refrigerator	15	7
Range		
Gas	13	7
Electric	12	6
Dishwasher	11	7
Washer, automatic	11	5
Dryer		
Gas	13	na
Electric	14	5

na = not available

Source: U.S. Department of Agriculture,
Agricultural Research Service.

ELECTRIC HOUSEWARES

GENERAL STATISTICS ON THE ELECTRIC HOUSEWARES INDUSTRY

As noted in the introductory section of this Fact File, covering General Statistics on Major Appliances & Electric Housewares, industry data on a combined basis is reported by the Census Bureau and other government sources. However, available separate figures for the electric housewares segment are covered in this section.

U.S. manufacturers classified in the electric housewares and fans industry shipped $3.1 billion worth of goods (both primary and secondary), including miscellaneous receipts, in 1981, 6.7% less than in 1980, according to the Annual Survey of Manufactures.

Electric Housewares & Fans (SIC 3634*)

	1981	1980	1979	1977
Number of companies	na	na	na	239
Number of establishments, total**	na	248	253	291
Number with 20 or more employees	138	139	140	148
Employees, total (thous.)	44.0	47.1	46.8	47.3
Production workers (thous.)	34.2	36.8	36.7	37.6
Payroll (mil. $)	$ 568.3	$ 574.4	$ 531.2	$ 458.7
Value added by manufacture# (mil. $)	1,515.5	1,690.0	1,417.4	1,365.7
Value of industry shipments## (mil. $)	3,078.4	3,299.8	2,868.9	2,531.2
Capital expenditures, new (mil. $)	74.4	70.1	62.1	47.8

na = not available

*SIC 3634 includes establishments primarily engaged in manufacturing electric housewares for heating, cooking, and other purposes. Important products of this industry include electric air heaters, fans, electrically heated bed coverings, blenders, broilers, deep fat fryers, flat irons, food mixers, hot plates, percolators, coffee makers and roasters. Also included in this industry are personal care electrics: hair curlers, hair dryers, massage machines, electric razors, sauna heaters, electric toothbrushes and water pulsating devices.

**Each business location is counted as a separate establishment. Data for 1979-1981 include only establishments with payrolls, as reported in County Business Patterns.

#Value added by manufacture is derived by subtracting the total cost of materials (including materials, supplies, fuel, electric energy, cost of resales and miscellaneous receipts) from the value of shipments (including resales) and other receipts and adjusting the resulting amount by net change in finished products and work-in-process inventories between the beginning and end of year.

##Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. It includes receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It also includes both primary and secondary products made in the industry. Value of shipments by all producers (including secondary manufacturers of electric housewares) is covered on pages 27-29.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977 Annual Survey of Manufactures, 1979, 1980, 1981

GENERAL STATISTICS ON THE ELECTRIC HOUSEWARES INDUSTRY

Employment & Earnings

Employment & Earnings in the Electric Housewares & Fans Industry
Annual Averages 1981, 1982 & January-August 1982, 1983

	January-August Average			Annual Averages		
	1983(p)	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Electric housewares & fans (SIC 3634)						
All employees (thous.)	42.0	43.2	- 2.8%	43.9	50.8	- 13.6%
Production workers (thous.)	32.0	33.3	- 3.9	33.9	40.7	- 16.7
Avg. weekly earnings	$254.72	$228.05	+ 11.7	$239.65	$231.99	+ 3.3
Avg. hourly earnings	6.62	6.23	+ 6.3	6.34	6.01	+ 5.5
Avg. weekly hours	38.5	36.6	+ 5.2	37.8	38.6	- 2.1

(p) = preliminary.

Source: U.S. Bureau of Labor Statistics

Concentration in the Industry

Number of Manufacturing Plants in the Electric Housewares & Fans Industry
By Employment Size, 1981
(Includes only establishments with payrolls)

	Electric Housewares & Fans (SIC 3634)	
	Number	% of Total
Total plants	249	100.0%
Number by employment size:		
Under 20 employees	111	44.6
20-99 employees	48	19.3
100-499 employees	63	25.3
500 or more employees	27	10.8

Source: U.S. Bureau of the Census, County Business Patterns 1980

ELECTRIC HOUSEWARES SHIPMENTS

The total value of manufacturers' shipments of electric housewares in 1981, not including parts, was reported by the Census Bureau at close to $2.0 billion. This includes shipments by all producers, regardless of industry classification. Shipments of fans (not including industrial) were valued at $649 million.

ELECTRIC HOUSEWARES SHIPMENTS

Value of Product Shipments, 1977-1981
(Millions of Dollars)

	1981	1980	1979	1978	1977	% Change 1981/1977
Total reported	$2,874.1	$3,093.7	$2,730.4	$2,371.1	$2,304.0	+ 24.7%
Electric housewares, exc. fans	1,997.8	2,135.9	2,040.7	1,837.2	1,846.2	+ 8.2
Electric fans (exc. industrial)	648.7	700.6	496.1	341.9	257.0	+152.4
Electric housewares parts	167.3	187.2	160.1	128.6	148.4	+ 12.7
Electric housewares/fans, type not specified	60.3	70.0	33.5	63.9	52.4	+ 15.1

Source: U.S. Bureau of the Census,
1981 Annual Survey of Manufactures
(M81AS-2)

Through an annual survey among all known manufacturers of electric housewares and fans (approximately 140 companies), the U.S. Bureau of the Census develops information on the quantity and value of manufacturers' shipments of specific products, which is covered in the following table.

Quantity & Value of Shipments of Electric Housewares & Fans By Product, 1981, 1982

	No. of U.S. Producers	Quantity (Thous. Units)		Value (Mil. $)		% Change
	1982	1982	1981	1982	1981	1982/1981
Electric housewares & fans, total	140	--	--	$2,495.3	$2,723.4	- 8.4%
Electric housewares, total (excl. parts)*	103	--	--	1,920.5	2,062.8	- 6.9
Food preparation appliances:						
Broilers with or without rotisseries	8	773.1	1,066.8	26.1	34.4	- 24.1
Automatic coffee makers, total	na	13,561.9	14,086.1	254.8	256.1	- 0.5
Drip type	14	9,651.5	9,594.8	194.0	189.5	+ 2.4
Percolator or vacuum type	8	3,021.0	3,461.4	41.9	47.1	- 11.0
Urn type	6	889.3	1,029.9	18.9	19.4	- 2.6
Deep fat fryers	8	1,987.1	2,038.6	24.9	25.9	- 3.9
Ovens & roasters, with or without broilers	10	2,594.7	3,359.4	99.6	130.4	- 23.6
Hot plates & disc stoves (1,650 watts or less)	10	1,117.4	1,278.8	15.9	17.0	- 6.5
Automatic toasters	6	6,591.3	7,690.1	84.9	96.6	- 12.1
Waffle irons, sandwich grills, griddles & combinations	14	1,411.4	1,825.8	31.6	40.3	- 21.6
Frying pans (skillets)	9	3,202.7	2,628.9	77.0	66.4	+ 16.0

(continued)

Quantity & Value of Shipments of Electric Housewares & Fans By Product, 1981, 1982

(continued)

	No. of U.S. Producers	Quantity (Thous. Units)		Value (Mil. $)		% Change
Food preparation appliances (cont'd.)	1982	1982	1981	1982	1981	1982/1981
Corn poppers, total	na	3,568.0	3,687.9	$ 49.4	$ 56.0	- 11.8%
Hot-air type	3	1,988.0	3,687.9	30.5	56.0	--
Other than hot-air type	9	1,579.4		18.9		--
Household food processors	7	1,390.9	1,503.5	60.2	66.1	- 8.9
Household food mixers, total	na	8,988.6	10,367.0	230.3	252.1	- 8.6
Hand (portable)	6	2,662.1	3,440.0	31.7	37.9	- 16.4
Stand type	4	1,542.0	1,666.2	94.6	106.4	- 11.1
Blenders (liquefiers)	5	4,784.6	5,260.7	104.0	107.8	- 3.5
Ice crushers	4					
Household food preparation appliances, except mixers	9	1,507.5	1,737.2	39.4	39.3	+ 0.2
Can openers	8	4,127.9	4,357.8	46.7	45.6	+ 2.4
Other household type electric cooking/heating appliances	22	na	na	95.3	108.1	- 11.8
Electric irons, standard household types	6	6,600.0	11,013.1	88.4	137.0	- 35.5
Electric blankets	3	4,942.7	4,172.4	132.2	122.9	+ 7.6
Electric heating pads	8	3,795.2	3,958.1	26.9	26.3	+ 2.3
Hair dryers	6	791.2	1,075.3	11.0	14.1	- 22.1
Other small electric appliances, incl. curling irons, vibrators, portable dehumidifiers	33	--	--	188.0	191.3	- 1.7
Portable humidifiers	11	2,548.8	2,925.5	35.3	36.5	- 3.3
Heaters, etc.						
Air space heaters, total	na	7,196.0	8,090.2	181.9	196.6	- 7.5
Portable room heaters, total	na	4,168.9	4,355.3	91.7	93.0	- 1.4
Fan forced type	19	3,165.5	2,959.2	63.6	58.8	+ 8.2
Other than fan forced (convector, radiant)	17	1,003.3	1,396.2	28.1	34.1	- 17.6
For fixed installations, all types	na	3,027.1	3,734.9	90.2	103.6	- 12.9
Baseboard, except glass panel	15	1,924.4	2,405.6	42.0	49.5	- 15.1
Other than baseboard	15	1,102.7	1,329.3	48.2	54.1	- 10.9
Electric fans, except industrial	39	19,205.0	21,692.7	574.8	660.5	- 13.0
Desk & wall bracket	na	4,241.8	4,006.4	66.3	64.2	+ 3.3
Window (household) permanent type	na	425.1	522.5	13.9	16.8	- 17.3
Portable window fans	9	6,557.3	7,211.2	104.2	119.5	- 12.8
Roll-abouts	3					
Electric range hoods, total	na	1,610.9	1,980.0	64.6	79.5	- 18.7
Ducted	15	855.1	1,063.1	40.4	50.5	- 20.0
Nonducted	14	755.9	916.9	24.1	29.0	- 16.9

(continued)

ELECTRIC HOUSEWARES SHIPMENTS

Quantity & Value of Shipments of Electric Housewares & Fans By Product, 1981, 1982 (continued)

Electric fans (cont'd.)	No. of U.S. Producers 1982	Quantity (Thous. Units) 1982	Quantity (Thous. Units) 1981	Value (Mil. $) 1982	Value (Mil. $) 1981	% Change 1982/1981
Oven hoods	3	56.7	99.1	$ 3.8	$ 5.7	- 33.3%
Ceiling fans	11	3,898.3	5,111.9	176.3	198.3	- 11.1
All other household type ventilating & exhaust fans	6	842.9	928.5	28.4	30.2	- 6.0
All other electric fans	7	1,589.7	1,833.1	117.3	146.4	- 19.9

*Includes electric housewares not separately reported, such as shavers, knives, toothbrushes, etc.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Electric Housewares & Fans MA36E(82)-1.

Concentration Levels

The 50 largest manufacturers' of electric housewares and fans accounted for 90% of the total value of shipments in 1977 (latest available data). This compares with an 87% share in 1972.

Share of Shipment Value of Electric Housewares & Fans Accounted For By The Top Companies in 1977

	Total Value of Shipments (Mil. $)	Percent of Shipment Value Accounted For By-- Top 4 Companies	Top 8 Companies	Top 20 Companies	Top 50 Companies
Electric housewares & fans	$2,304.0	39%	53%	73%	90%
Electric fans (excl. industrial)	257.0	53	71	93	100
Electric housewares	1,846.2	43	59	80	96

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing (MC77-SR-9).

Distribution of Manufacturers' Sales

For the 16th annual National Housewares Manufacturers Association survey, 605 exhibitors at the January 1983 NHMA International Housewares Exposition supplied data on the type of outlets to which they sell. More than a quarter of their sales were to mass merchandisers, far ahead of the 12% of sales done with catalog showrooms, which was the second highest amount. The survey, conducted by B. Angell & Associates, solicits input from all types of housewares manufacturers, not just those manufacturing electric housewares.

ELECTRIC HOUSEWARES SHIPMENTS

Distribution of Manufacturers' Sales

Percentage Breakdown of Housewares Manufacturers' Sales, 1982

	1982
Total sales	100%
Mass merchandisers	28
Catalog showrooms	12
Department stores	9
Housewares/hardware distributors	7
Drug stores	6
Food stores	5
Housewares/hardware stores	5
Buying syndicates	3
Electric housewares distributors	3
Rack jobbers	3
Variety stores	3
All other retailers & wholesalers	16

Source: Based on National Housewares Manufacturers Association 16th Annual Marketing Research Study of Housewares Manufacturers, 1982

PRODUCER PRICES

Prices of electric housewares and fans at the factory level increased 3.0% in 1982 from the previous year. Men's electric razor prices fell 11.5% and range hoods rose the most, 5.8%.

Producer Price Indexes For Specified Electric Housewares, 1981, 1982
(1967 = 100 unless otherwise indicated)

	Annual Averages		
	1982	1981	% Change 1982/1981
All commodities	299.3	293.4	+ 2.0%
Electric housewares & fans	176.4	171.3	+ 3.0
Standard household electric iron	146.1	145.5	+ 0.4
Can opener, electric (12/70 = 100)	179.4	174.9	+ 2.6
Shaver, men's	131.9	149.0	- 11.5
Range hoods	195.5	184.7	+ 5.8

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports of Electric Housewares

Because the electric housewares industry is more labor-intensive than the major appliance industry, imports play a more important role in this market. In 1982, several electric housewares items posted large increases in import value, such as irons (+71.5%), coffee-makers (+36.1%), shavers (+29.2%) and hair curlers (+20.4%). Some categories did decline in value, namely portable cooking and food-warming appliances (-23.8%), hair dryers (-1.5%) and miscellaneous electric housewares (-23.8%).

Quantity & Value of Imports of Specified Electric Housewares, 1981, 1982

	Quantity (Thous. Units)			C.I.F. Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Toasters	209.6	123.1	+ 70.3%	$ 2.1	$ 0.9	+133.3%
Coffee makers	417.6	382.5	+ 9.1	8.3	6.1	+ 36.1
Electro-mechanical food blenders, food mixers & juice extractors	2,253.4	1,556.8	+ 44.7	23.6	18.5	+ 27.6
Electro-mechanical food grinders, slicers & choppers	632.4	414.9	+ 52.4	15.2	12.1	+ 25.6
Portable cooking & foodwarming appliances, nspf	3,753.5	4,417.3	- 15.0	34.6	42.3	- 18.2
Electro-mechanical appliances, nspf	1,518.6	2,101.8	- 27.7	36.1	47.4	- 23.8
Electrothermic appliances, nspf	7,337.9	8,828.6	- 16.9	53.6	46.6	+ 15.0
Flat irons, electric	4,240.9	2,534.9	+ 67.3	45.1	26.3	+ 71.5
Electric shavers	4,012.4	3,501.7	+ 14.6	60.1	46.5	+ 29.2
Electric hair dryers	15,287.3	15,077.5	+ 1.4	92.7	94.1	- 1.5
Electric hair curlers	--	--	--	66.7	55.4	+ 20.4
Electric hair care appliances, nspf	--	--	--	32.1	27.5	+ 16.7

nspf = not specially provided for.

* The C.I.F. (cost, insurance, freight) value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Department of Commerce
U.S. General Imports
December 1981, 1982

FOREIGN TRADE

Exports of Electric Housewares

Quantity & Value of U.S. Exports of Specified Electric Housewares
1981, 1982

	Quantity (Thous. Units)			Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Toasters	991.1	1,252.3	- 20.9%	$ 17.0	$ 19.1	- 11.0%
Coffeemakers	1,010.2	1,263.9	- 20.1	16.2	18.2	- 11.0
Portable household cooking apparatus, including food or plate warmers, of base metal	638.5	664.2	- 3.9	17.2	14.8	+ 16.2
Electro-mechanical food blenders, mixers & juice extractors	889.0	1,343.3	- 33.8	25.1	31.6	- 20.6
Food grinders, slicers & choppers, electro-mechanical	126.7	351.4	- 63.9	5.4	12.9	- 58.1
Can openers, including combination units, electro-mechanical	224.6	195.5	+ 14.9	2.6	2.3	+ 13.0
Portable electrothermic kitchen & household appliances	598.9	607.7	- 1.4	15.1	16.6	- 9.0
Electro-mechanical appliances, nspf	703.2	1,099.5	- 36.0	22.1	26.0	- 15.0
Flat irons, electric	1,019.1	1,887.6	- 46.0	11.2	21.4	- 47.7
Electric shavers	518.5	316.0	+ 64.1	5.8	3.0	+ 93.3
Hairdressing appliances, electric	--	--	--	4.5	5.6	- 19.6

nspf = not specially provided for.

*Value is equivalent to f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the carrier as well as freight, insurance and any other charges beyond the port of exportation.

Source: U.S. Department of Commerce,
U.S. General Exports,
December 1981, 1982.

APPARENT CONSUMPTION OF ELECTRIC HOUSEWARES IN THE U.S.

As part of their annual review on the housewares industry, Merchandising magazine estimated apparent consumption (domestic shipments plus imports minus exports) of kitchen electrics, personal care items and air treatment products in 1982 and projected 1983 apparent consumption for the same items. The listing below includes only those items for which apparent consumption could not be obtained via government sources.

APPARENT CONSUMPTION OF ELECTRIC HOUSEWARES IN THE U.S.

Apparent Consumption of Kitchen Electrics, Personal Care & Air Treatment Products, 1982 & 1983 Projections
(Thousands of Units)

	Apparent Consumption		
	1983	1982	% Change 1983/1982
Kitchen electrics:			
Bag sealers	1,929	2,016	- 4.3%
Blenders	4,738	4,587	+ 3.3
Broilers, total	2,125	2,205	- 3.6
With rotisseries	370	385	- 3.9
Without rotisseries	1,755	1,820	- 3.6
Cornpoppers, total	5,806	5,778	+ 0.5
Hot air	3,750	3,862	- 2.9
Hot oil	2,056	1,916	+ 7.3
Deep fryers, total	3,167	3,031	+ 4.5
Mini	1,698	1,632	+ 4.0
Regular	1,469	1,399	+ 5.0
Food mixers, total	5,295	5,217	+ 1.5
Stand type	1,198	1,208	- 0.8
Portable, hand type	4,097	4,009	+ 2.2
Food processors	2,728	2,689	+ 1.5
Frypans/skillets (electric)	2,740	2,632	+ 4.1
Hotplates & buffet ranges	955	905	+ 5.5
Ice cream makers	1,370	1,348	+ 1.6
Microwave appliances, total	642	587	+ 9.4
Cornpoppers	574	518	+ 10.8
Coffeemakers	15	14	+ 7.1
Pizza crispers	24	29	- 17.2
Steamers	29	26	+ 11.5
Pasta makers (electric)	381	350	+ 8.9
Slicing knives	1,490	1,580	- 5.7
Slow cookers	5,363	5,500	- 2.5
Toaster ovens, total	3,025	2,828	+ 7.0
Without broilers	868	840	+ 3.3
With broilers	2,157	1,988	+ 8.5
Waffle irons/sandwich grills	1,290	1,152	+ 12.0
Woks (electric)	594	560	+ 6.1
Personal care electrics:			
Curling irons/styling wands, total	6,007	5,984	+ 0.3
Dry	4,521	4,084	+ 10.7
Mist	1,486	1,900	- 21.8
Foot massagers/baths	1,830	1,615	+ 13.3
Hair dryers, total	18,232	18,413	- 1.0
Pistol	14,081	13,398	+ 5.1
Styling	3,228	4,000	- 19.3
Hard top	579	605	- 4.3
Soft bonnet	344	410	- 16.1

(continued)

APPARENT CONSUMPTION OF ELECTRIC HOUSEWARES IN THE U.S.

Apparent Consumption of Kitchen Electrics, Personal Care & Air Treatment Products, 1982 & 1983 Projections

(Thousands of Units)
(continued)

	Apparent Consumption		
	1983	1982	% Change 1983/1982
Personal care electrics: (continued)			
Hair setters, total	2,986	2,843	+ 5.0%
Dry	1,804	1,599	+ 12.8
Mist	1,182	1,244	- 5.0
Make-up mirrors	1,704	1,729	- 1.4
Massagers, hand-held	1,274	1,142	+ 11.6
Massagers, shower	2,470	2,250	+ 9.8
Oral hygiene devices, total	1,729	1,625	+ 6.4
Water pulsators	1,170	1,091	+ 7.2
Electric toothbrushes	559	534	+ 4.7
Shavers, total	6,250	6,367	- 1.8
Men's	5,067	5,031	+ 0.7
Women's	1,183	1,336	- 11.5
Whirlpool baths, portable	125	118	+ 5.9
Air treatment products:			
Fans, total	20,237	19,751	+ 2.5
Window	5,385	5,770	- 6.7
Kitchen/bathroom built-in exhaust	3,045	2,827	+ 7.7
Range & oven hoods	2,488	2,278	+ 9.2
Desk, bracket & pedestal	3,293	2,843	+ 15.8
Hassock/roll-about	908	966	- 6.0
Ceiling	5,118	5,067	+ 1.0
Portable electric heaters, total	4,757	4,069	+ 3.2
Oil-filled	492	441	+ 11.6
Fan-forced	2,963	2,829	+ 4.7
Non-fan-forced	175	173	+ 1.2
Baseboard	228	240	- 5.0
Quartz	899	926	- 2.9
Humidifiers	898	895	+ 0.3
Vaporizers	1,754	1,808	- 3.0
Air purifiers, total	5,800	5,650	+ 2.7
Filtration devices	5,060	5,100	- 0.8
Ionization devices	740	550	+ 34.5

Source: Merchandising magazine,
"Ninth Annual Housewares Statistical & Marketing Report", September 1983

MAJOR APPLIANCES & ELECTRIC HOUSEWARES

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Appoximately a quarter of all major appliance sales are made to builders. Hence, the surge in housing starts during 1983 has improved the appliance industry outlook for the immediate future.

The number of housing starts in the January to September 1983 period jumped 70.9% over the same 1982 time frame to 1.3 million units as against 0.8 million units. In 1982, privately-owned housing starts were 2.0% lower, at 1.06 million, than in 1981.

New Privately Owned Housing Units Started, 1981, 1982
& Annual Projections Based on January-September Starts, 1982, 1983
(Thousands of Units, Seasonally Adjusted)

	January-September			Annual Starts		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
Privately-owned housing starts	1,298.5	759.9	+ 70.9%	1,062.2	1,084.2	- 2.0%

Source: U.S. Bureau of the Census,
Construction Reports Division.

More authorization for new privately-owned housing units were issued in the first nine months of 1983 than in the entire preceding year, according to the Census Bureau. A total of 1.2 million starts were authorized between January and September 1983 compared with 1.0 in all of 1982 and 0.7 million in the same nine month period in 1982.

New Privately Owned Housing Units Authorized, 1981, 1982
& January - September 1982, 1983
(Thousands of Units)

	January-September			Annual Authorizations		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1983/1982
Privately-owned housing units authorized	1,216.7	711.1	+ 71.9%	1,000.5	985.5	+ 1.5%

Source: U.S. Bureau of the Census,
Construction Reports Division.

THE POTENTIAL MARKET

The typical U.S. household had an income of $20,171 in 1982, according to the Census Bureau. This total includes income derived from all sources, not just wages. Households headed by a person aged 45-54 had the highest median income, $27,985, followed by the $26,370 received by households with a head aged 35-44.

Total Money Income of Households by Age of Householder, 1982
(Number of households as of March 1983)

		Age of Householder					
	Total	15-24	25-34	35-44	45-54	55-64	65 & over
Number of households (000)	83,918	5,695	19,104	16,020	12,354	13,074	17,671
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total money income:							
Under $10,000	23.9	34.2	17.2	14.0	14.5	20.6	45.9
$10,000-$19,999	25.6	35.0	28.8	20.7	19.1	24.7	29.1
$20,000-$29,999	20.8	20.5	26.6	23.5	20.1	20.2	13.2
$30,000-$39,999	13.3	6.8	15.7	18.5	17.0	13.1	5.5
$40,000-$49,999	7.5	2.0	6.7	10.8	12.2	9.0	2.5
$50,000-$74,999	6.4	1.2	3.9	9.3	12.5	8.2	2.5
$75,000 & over	2.5	0.3	1.1	3.2	4.6	4.1	1.2
Median income	$20,171	$13,816	$21,281	$26,370	$27,985	$22,075	$11,041
Mean income	24,309	15,940	23,433	29,353	31,941	27,249	15,869

Source: U.S. Bureau of the Census,
Current Population Reports,
Consumer Income P-60 No. 140

Number of Households by Geographic Region in the U.S., 1975, 1981
(Number in Thousands)

	Total		% Distribution		% Change
	1981	1975	1981	1975	1981/1975
Households, U.S. total	82,368	72,867	100.0%	100.0%	+ 13.0%
Northeast	17,781	16,427	21.6	22.5	+ 8.2
North Central	21,200	19,256	25.7	26.4	+ 10.1
South	27,220	23,407	33.0	32.1	+ 16.3
West	16,167	13,777	19.6	18.9	+ 17.3

Source: U.S. Bureau of the Census,
Current Population Reports,
(P-20; Nos. 311, 371).

THE POTENTIAL MARKET

Projected Number of Households in the U.S.
Selected Years, 1983 - 1995
(In Thousands)

1983	1985	1990	1995
85,895	89,705	98,950	107,528

Source: U.S. Bureau of the Census
Population Estimates & Projections
(P-25, No. 805)

RETAIL SALES

The total value at retail of all major appliances and electric housewares reaching consumers (designated "personal consumption expenditures") was reported at about $19.6 billion in 1982, less than 1% above the 1981 total, according to the Department of Commerce.

Personal Consumption Expenditures For Major Appliances
& Electric Housewares, 1979-1982
(Millions of Dollars)

1982	1981	1980	1979
$19,557	$19,508	$18,048	$16,837

Source: U.S. Department of Commerce,
Office of Business Economics.

Based on the latest official source of information on merchandise line sales, the 1977 Census of Retail Trade compiled by the U.S. Bureau of the Census, it is estimated that personal consumption expenditures for major appliances amounted to about $14.0 billion in 1982, electric housewares totaled about $45.6 billion.

By Outlet Type: Major Appliances

Official data on appliance sales by outlet type is contained in the 1977 Census of Retail Trade, the latest official source of this data. The information was gathered only from stores with payrolls, but not all store types broke out their sales in detail. The following table reflects appliance sales in the major outlet types.

Reported sales of major appliances were $9.2 billion in 1977. Department stores accounted for 34.7% of sales, followed by household appliance stores with a 30.3% share.

RETAIL SALES

By Outlet Type: Major Appliances

Reported Sales of Major Appliances by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number	% of Total	Mil. $	% of Total
Total reported	71,966	100.0%	$9,179.2	100.0%
Department stores**	5,861	8.1	3,181.2	34.7
Household appliance stores	11,944	16.6	2,781.9	30.3
Mail order & direct selling establishments	5,622	7.8	794.2	8.7
Furniture & home furnishings stores	11,216	15.6	743.9	8.1
Miscellaneous general merchandise stores	3,784	5.3	419.0	4.6
Other retail outlets	33,539	46.6	1,258.7	13.6

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Nearly a quarter of 1982 sales of floor care products (vacuums, carpet sweepers and floor polishers) were split among Sears, Penneys and Wards, according to *Merchandising* magazine estimates.

Percent of Sales of Floor Care Products By Type of Outlet, 1982

	Floor Care Products
Sears, Penneys, Wards	23%
Catalog showrooms	18
Discount stores	16
Department stores	15
Vacuum shops	8
Door-to-door	7
Housewares/hardware shops	4
All other stores	9

Source: *Merchandising* magazine
"Ninth Annual Housewares Statistical &
Marketing Report" September 1983

RETAIL SALES

By Outlet Type: Electric Housewares

Sales of small electrical appliances in major outlet types reporting sales in 1977 came to $2.8 billion, according to the most recent census. Department stores sold $1.2 billion of this total, or 43.8%. Miscellaneous general merchandise stores (variety stores, etc.) held a 16.2% share.

Reported Sales of Electrical Housewares By Store Type, 1977

(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Total reported	81,725	100.0%	$2,849.4	100.0%
Department stores**	8,084	9.9	1,248.9	43.8
Miscellaneous general merchandise stores	8,141	10.0	461.2	16.2
Drug stores	12,211	14.9	223.9	7.9
Hardware stores	10,919	13.4	160.4	5.6
Food stores	4,295	5.2	128.2	4.5
Household appliance stores	2,659	3.2	120.4	4.2
Mail order & direct selling establishments	3,903	4.8	116.0	4.1
Other retail outlets	31,513	38.6	390.4	13.7

(See footnotes on preceding table on sales of major appliances by store type.)

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L

About a quarter of all electric housewares sold in 1982 were purchased in discount stores, according to trade sources. Catalog showrooms were the second most popular outlets, with 15% of all electric housewares units sold there.

Place of Purchase of Electric Housewares, 1982

(Percent of Units Sold)

	Percent of Units Sold
Discount stores	24%
Catalog showrooms	15
Department stores	11
Mass merchandisers	10
Housewares/hardware stores	6
Variety stores	4
All other outlets	30
Total	100

RETAIL SALES

By Outlet Type: Appliance Stores

Sales of household appliance stores from January through August 1983 rose 9.1% versus the comparable 1982 time frame, according to the Census Bureau.

Total Sales of Household Appliance Stores, 1980-1982

	1982	1981	1980	% Change 1982/1981
Total sales (mil. $)	$7,366	$7,756	$7,322	- 2.8%
No. of stores*	na	9,655	9,974	

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales, County Business Patterns.

na = not available.
* Includes only stores with payrolls.

Monthly Sales Pattern in Household Appliance Store Sales, 1981, 1982

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1982	7.4%	7.0%	7.8%	7.6%	7.8%	8.6%	9.5%	8.3%	8.0%	8.2%	8.8%	11.1%	100.0%
1981	7.7	6.6	7.4	7.5	7.6	8.7	9.1	8.2	8.2	8.9	9.3	10.9	100.0

Source: Based on U.S. Bureau of the Census, Revised Monthly Retail Sales BR-13-82S

By Outlet Type: Department Stores

Sales of small electrical appliances in 1982 increased 3.2% in the typical department store with sales over $1 million, according to the National Retail Merchants Association. Major appliance sales fell 1.9% and vacuums and floor polisher purchases were up 4.3% compared with a 3.8% sales rise for all upstairs departments.

RETAIL SALES

By Outlet Type: Department Stores

Merchandising & Operating Results of Major Appliance & Small Electrical Appliance Departments in Department Stores, 1982

(Median results in stores with total sales over $1 million)

	Total Upstairs Store (103*)	Major Appliances (44*)	Vacuums & Floor Polishers (12*)	Small Electrical Appliances (75*)
Net sales, % change from last year	+ 3.8%	- 1.9%	+ 4.3%	+ 3.2%
Sales, % of merchandise division**	--	26.0	7.0	31.3
Sales, % of total store sales	90.7	1.1	0.3	1.1
$ sales per square foot of selling space (main or largest selling unit)	$109.0	$205.0	$281.5	$111.0
Cumulative markon, %	48.4%	27.2%	30.8%	28.1%
Gross margin, % of sales (including cash discounts)	41.9	22.4	23.4	21.6
Markdowns, % of sales (including employee discounts)	14.4	6.8	12.0	7.8
Number of stock turns	2.7	3.2	2.8	2.4

*Number in parentheses refers to the number of reporting firms in each category

**The merchandise division for all three departments is appliances and utility equipment.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1982.

By Outlet Type: Home Furnishings Stores

An annual survey conducted among member retailers of the National Home Furnishings Association found that washers and dryers were carried in 29.2% of the surveyed furniture-home furnishings stores. Refrigerators, freezers, stoves and ranges were sold in 28.6% of these outlets with air conditioners carried in 22.6%.

Approximately 77% of the 21,000 square feet of space in the typical home furnishings store surveyed was used for selling. Appliances were given 1.9% of the sales space and generated $132.57 in sales per square foot, the highest ratio in the store. Median sales per square foot for all items was $67.09.

RETAIL SALES

By Outlet Type: Home Furnishings Stores

Space Allocation & Appliance Sales Per Square Foot In Home Furnishings Stores, 1982

(Median Results)

	% of Store Selling Space	Sales Per Square Foot of Selling Space	
		Appliances	Total Store
Total firms	1.9%	$ 132.57	$ 67.09
By Sales Volume:			
Under $500,000	2.6	84.21	30.00
$500,000 - $1 million	1.3	na	46.52
$1 million - $3 million	1.1	152.52	82.14
Over $3 million	2.5	132.57	93.41

na = not available.

Source: National Home Furnishings Association, Annual Operating Experiences Report 1982
August 1983

By Area

Estimated Retail Sales of Major Appliances In 25 Leading Metropolitan Areas, 1981

Rank	Metropolitan Area	Major Appliance Sales (Mil. $)		Sales in FHA Stores* (Mil. $)	
		Total	% of U.S. Total	Total	% of U.S. Total
1	Los Angeles-Long Beach	$ 452.5	9.9%	$ 185.3	9.8%
2	Chicago	392.3	8.5	163.7	8.7
3	New York	319.0	6.9	175.7	9.3
4	Boston-Lowell-Brockton-Lawrence	306.6	6.7	60.2	3.2
5	Detroit	268.0	5.8	137.0	7.2
6	Houston	251.0	5.5	75.6	4.0
7	Philadelphia	249.9	5.4	153.3	8.1
8	Dallas-Fort Worth	243.3	5.3	97.8	5.2
9	San Francisco-Oakland	170.8	3.7	61.3	3.2
10	Washington, D.C.	163.2	3.5	57.5	3.0
11	Anaheim-Santa Ana-Garden Grove	145.4	3.2	45.0	2.4
12	Nassau-Suffolk	140.7	3.1	81.5	4.3
13	St. Louis	137.5	3.0	59.8	3.2
14	Minneapolis-St. Paul	130.6	2.8	37.3	2.0
15	San Diego	128.3	2.8	46.0	2.4
16	Pittsburgh	122.7	2.7	53.5	2.8

(continued)

RETAIL SALES

By Area

Estimated Retail Sales of Major Appliances In 25 Leading Metropolitan Areas, 1981
(continued)

		Major Appliance Sales (Mil. $)		Sales in FHA Stores* (Mil. $)	
Rank	Metropolitan Area	Total	% of U.S. Total	Total	% of U.S. Total
17	Denver-Boulder	$ 117.7	2.6%	$ 58.9	3.1%
18	Seattle-Everett	116.4	2.5	48.2	2.5
19	Miami	114.2	2.5	53.3	2.8
20	Atlanta	113.5	2.5	24.6	1.3
21	Baltimore	113.2	2.5	44.2	2.4
22	Portland, Or.	104.2	2.3	57.1	3.0
23	Tampa-St. Petersburg	102.7	2.2	36.4	1.9
24	Phoenix	94.0	2.0	40.8	2.2
25	Cleveland	93.8	2.0	36.6	1.9
	25 Metropolitan areas, total	$ 4,591.5	33.2	$ 1,890.6	33.0
	U.S. Total	13,815.9	100.0	5,733.1	100.0

*Furniture, home furnishings and appliance stores that sell goods for furnishing the home, including furniture, floor coverings, draperies, glass & chinaware in addition to household appliances.

Source: Based on Sales & Marketing Management
"1982 Survey of Buying Power"
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RETAIL ADVERTISING

Percent of Year's Total Newspaper Ad Linage Done By Retailers Each Month, 1981

	Clothes Dryers	Clothes Washers	Refrigerators	Room Air Conditioners
January	9.0%	9.0%	7.5%	3.2%
February	8.0	8.3	6.7	2.8
March	8.4	8.0	8.0	5.2
April	9.9	9.2	7.9	7.7
May	8.5	8.9	10.5	15.1
June	7.6	7.3	9.8	23.4
July	8.3	8.4	12.1	26.5
August	8.4	8.2	9.3	9.8
September	7.5	8.3	8.3	2.5

(continued)

RETAIL ADVERTISING

Percent of Year's Total Newspaper Ad Linage Done By Retailers Each Month, 1981 (continued)

	Clothes Dryers	Clothes Washers	Refrigerators	Room Air Conditioners
October	9.2%	9.8%	7.8%	1.3%
November	9.3	8.8	7.3	1.5
December	5.9	5.8	4.8	1.0

Source: Advertising Checking Bureau,
Neustadt Reports Division based on
newspaper advertising in Chicago,
Philadelphia, Cincinnati, Cleveland,
Dallas, Los Angeles & Washington, D.C.

CONSUMER PRICES

In the twelve month period ended August 1983, the consumer price index for household appliances rose only 2.1%. Major appliances prices tracked by the Bureau of Labor Statistics were below this level over the same period, with the exception of laundry equipment. This category rose at a slightly faster 3.4% pace.

Consumer Price Indexes For Specified Major Appliances, 1981, 1982 & August 1982, 1983

	August			Annual Averages		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
All items	300.3	292.8	+ 2.6%	289.1	272.4	+ 6.1%
Household appliances	188.0	184.1	+ 2.1	183.1	172.6	+ 6.1
Refrigerators & home freezers	191.4	187.4	+ 2.1	187.3	173.5	+ 8.0
Laundry equipment (12/77 = 100)	142.0	137.3	+ 3.4	136.8	127.6	+ 7.2
Other household appliances (12/77 = 100)	125.4	124.3	+ 0.9	123.1	117.9	+ 4.4
Stoves, dishwashers, vacuums & sewing machines (12/77 = 100)	123.7	122.7	+ 0.8	122.2	117.3	+ 4.2
Office machines, small electric appliances & air conditioners 12/77 = 100)	127.2	126.0	+ 0.9	124.2	118.5	+ 4.8

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

Major Appliances & Small Electric Appliances

A *Business Week*/Harris Poll of 1,254 persons across the U.S. indicated that consumers will be more willing to spend money on major appliances and small electric appliances in the next two years than they did in the last two years. Only 13% of respondents said they will cut spending in the next 12 months compared with 25% who reduced spending during the year prior to the survey.

Outlook for Consumer Spending on Major Appliances, Small Appliances & New Homes

	Bought in the Past Two Years	Will Buy in the Next Two Years
Small appliances	42%	47%
Major appliance	28	32
New home	8	13

Source: Louis Harris & Associates,
Business Week October 17, 1983

Major Appliances

Better Homes & Gardens magazine regularly polls the members of their Consumer Panels on major appliances and electric housewares. Panel members are subscribers to BH&G and represent a more upscale market than the typical U.S. household. Over 50% of Panel households earn more than $25,000 and 8 out of 10 own a house.

In September 1981, 442 members of the 500 person panel responded to general questions about major appliances. Almost all of the respondents felt that quality was either very or somewhat important, more so than price.

The Importance of Specified Qualities in the Purchase of Major Appliances

	Very Important	Somewhat Important	Neither Important Nor Unimportant	Somewhat Unimportant	Very Unimportant	No Answer
Price	54.8%	40.5%	2.5%	0.7%	--	1.5%
Quality	93.9	5.0	--	--	0.5%	0.6
Financing	10.8	20.4	25.6	9.3	27.4	6.5
Brand reputation	55.0	34.2	7.2	1.4	0.2	2.0
Service	76.9	17.9	2.5	1.1	0.5	1.1
Looks	34.9	49.3	11.5	2.7	0.2	1.4
Energy efficiency	64.0	29.6	4.1	0.7	0.5	1.1
Other	3.2	0.9	--	--	0.2	95.7

Source: *Better Homes & Gardens* Magazine

CONSUMER BUYING HABITS

Electric Housewares

Attitudes of consumers toward housewares products were examined in a 1983 study commissioned by the National Housewares Manufacturers Association. The sample was drawn from a panel of nationally representative households and of the 2,400 questionnaires sent out, 1,940 responses were received.

Price was the most important factor when considering a small electrical appliance purchase to 37% of those questioned. The brand name was most important to 31% of respondents.

Factors Considered Most Important in the Purchase of Small Electrical Appliances, 1983

Most Important Factor	% of Respondents
Price	37%
Brand name	31
Selection	12
Warranty	10
Color/design	6
Sizes	3

Source: National Housewares Manufacturers Association
Survey of Attitudes and Purchase Habits of Consumers of Housewares Products

NOTE: Small electrical appliances include coffee makers, irons, humidifiers, food mixers, vacuum cleaners, hair dryers, electric blankets, electric toothbrushes, etc.

Ownership of Specified Small Electrical Appliances, 1983

	% of Respondents
Electric blender	87%
Drip coffee maker	61
Toaster oven	56
Food processor	30
Microwave oven	38
Expect to own a microwave oven in next 2 years	17

Source: NHMA
Survey of Attitudes and Purchase Habits of Consumers of Housewares Products

CONSUMER BUYING HABITS

Electric Housewares

Expected Durability of Small Electrical Appliances

Expect to replace every:	% of Respondents
2 years	9%
5 years	47
10 years	30
More than 10 years	14

Source: NHMA
Survey of Attitudes and Purchase Habits of Consumers of Housewares Products.

Discount stores were the overwhelming favorite of consumers in the purchase of air treatment products. Almost a third of consumers bought personal care items in discount stores with catalog showrooms a very strong second choice.

Percent of Sales of Kitchen Electrics, Personal Care & Air Treatment Products By Type of Outlet, 1982

	Kitchen Electrics	Personal Care	Air Treatment*
Discount stores	29%	32%	38%
Catalog showrooms	23	31	12
Sears, Penneys, Wards	12	7	18
Department stores	12	9	10
Housewares/hardware stores	6	5	12
Drug stores	4	13	5
All other stores	14	3	5

Source: Merchandising Magazine
"Ninth Annual Housewares Statistical & Marketing Report" September 1983

*This category includes fans, portable heaters, humidifiers, vaporizers and air purifiers.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

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THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (November)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Textile/Apparel
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THE FIBER/TEXTILE/APPAREL INDUSTRIES

General Trends

The precipitous downhill slide in the fiber/textile/apparel industries noted in 1982 came to a halt in 1983, and by the fourth quarter figures for the year on production, shipments and consumption were expected to show a modest gain. With inventories lean, the inflation rate stable and demand rising, industry executives expect 1983 to be a year of adjustment.

The crucial issue of imports, and the world situation in relation to expanding protected textile/apparel production abroad, do not auger well for the long-term health of the U.S. textile/apparel industries. Current figures show apparel imports dominating more than 30% (on a unit basis) of the apparel market, with this penetration expected to grow to more than 50% by the early 1990's.

A report on The Competitive Status of the U.S. Fibers, Textiles and Apparel Complex, sponsored by the National Research Council and published in 1983, assessed the future international competitiveness of the U.S. textile complex. In some specific segments, notably man-made fiber and yarn production, the U.S. industry continues to hold a competitive position. Various parts of the textile segment fall somewhere in between.

Most of the larger firms in the U.S. textile complex are taking steps to increase their competitiveness; however, these moves are not seen as resulting in increased domestic employment or even in maintaining existing employment levels. In sum, the panel doing the study projected a more internationally competitive, but smaller (in terms of number of firms and workers) U.S. textile complex in the future, almost regardless of any changes in government policy.

GENERAL STATISTICS

The fiber/textile/apparel complex is composed of several major segments and processes: fibers (man-made and natural), fabrics (woven, knit, and non-woven) and three major end-uses of fabrics--apparel, home furnishings and industrial. Then there are related processes, including designing, dyeing, printing and finishing, which are either separate segments themselves (i.e. done by independent companies) or within the vertically integrated textile companies. While the major segments of the complex are closely linked together, and for many purposes can be looked at as a whole, in some aspects, particularly in relation to the matter of imports, the segments are separate entities, with distinctive competitive pressures which seem to be growing, and distinct marketing techniques.

As of 1981 there were approximately 27,000 manufacturing companies in the American fiber/textile/apparel complex, with at least one located in every state. The latest industry data compiled by the government is the 1981 Annual Survey of Manufactures. The survey is conducted by the Census Bureau among a representative sample of manufacturers to provide for intercensal years--when a complete census of all manufacturers is undertaken--estimates on key manufacturing activity for industry groups. (The next complete Census report will cover the year 1982).

Estimates for 1981 and 1982 based on the annual surveys are covered in the following tables.

GENERAL STATISTICS

General Statistics by Industry Classification

Industry	1981	1980	1977
CELLULOSIC MAN-MADE FIBERS (SIC 2823*):			
Number of companies	na	na	20
Number of establishments	25	24	25
With 20 employees or more	10	12	10
Total employees (thous.)	15.6	16.1	16.0
Production workers (thous.)	12.2	12.7	12.6
Payrolls, total (mil. $)	$ 299.8	$ 279.0	$ 213.7
Value added by manufacture (mil. $)**	504.8	474.6	327.2
Cost of materials (mil. $)	929.4	877.8	683.2
Value of industry shipments (mil. $)***	1,424.0	1,357.3	1,002.8
Capital expenditures, new (mil. $)	111.8	83.2	29.4
ORGANIC FIBERS, NONCELLULOSIC (SIC 2824*)			
Number of companies	na	na	37
Number of establishments	60	62	66
With 20 employees or more	53	54	58
Total employees (thous.)	62.6	65.3	74.0
Production workers (thous.)	45.7	47.7	54.6
Payrolls, total (mil. $)	$1,351.0	$1,285.3	$1,086.1
Value added by manufacture (mil. $)**	3,894.4	3,312.5	2,804.4
Cost of materials (mil. $)	5,804.2	5,181.8	3,618.1
Value of industry shipments (mil. $)***	9,602.2	8,529.9	6,379.7
Capital expenditures, new (mil. $)	444.5	503.2	338.5
TEXTILE MILL PRODUCTS INDUSTRY (SIC 22*)			
Number of companies	na	na	5,733
Number of establishments	6,168	6,302	7,202
With 20 employees or more	3,754	3,917	4,131
Total employees (thous.)	785.2	816.1	875.7
Production workers (thous.)	678.5	706.2	764.6
Payrolls, total (mil. $)	$9,574.0	$9,228.1	$7,881.4
Value added by manufacture (mil. $)**	19,463.2	18,983.3	16,104.5
Cost of materials (mil. $)	31,061.0	28,605.8	24,753.2
Value of industry shipments (mil. $)***	50,262.2	47,255.0	40,550.5
Capital expenditures, new (mil. $)	1,724.8	1,488.3	1,223.5
APPAREL INDUSTRY, EXCLUDING OTHER FABRICATED TEXTILES (PART OF SIC 23*)			
Number of companies	na	na	17,310
Number of establishments	21,890	22,067	19,777
With 20 employees or more	10,655	11,052	10,243
Total employees (thous.)	1,251.1	1,307.3	1,149.1
Production workers (thous.)	1,078.6	1,129.5	1,001.1
Payrolls, total (mil. $)	$11,804.6	$11,354.3	$ 7,951.7
Value added by manufacture (mil. $)**	25,639.9	23,425.5	16,211.9
Cost of materials (mil. $)	24,657.2	22,690.7	16,067.0
Value of industry shipments (mil. $)***	49,822.9	45,781.8	32,031.9
Capital expenditures, new (mil. $)	646.0	607.8	340.3

(continued)

General Statistics by Industry Classification
(continued)

	1981	1980	1977
MISCELLANEOUS FABRICATED TEXTILE PRODUCTS (SIC 239*)			
Number of companies	na	na	6,444
Number of establishments	5,783	5,857	6,728
With 20 employees or more	1,745	1,766	1,689
Total employees (thous.)	160.2	160.2	185.2
Production workers (thous.)	132.6	132.6	155.5
Payrolls, total (mil. $)	$1,945.9	$1,945.9	$1,706.9
Value added by manufacture (mil. $)**	4,231.3	4,231.3	3,459.4
Cost of materials (mil. $)	5,348.5	5,348.5	4,798.5
Value of industry shipments (mil. $)***	9,519.1	9,519.1	8,213.2
Capital expenditures, new (mil. $)	149.7	149.7	116.4

na - not available

* Industry definitions, as classified in the official Standard Industrial Classification System: Cellulosic Man-made Fibers (SIC 2823) and Organic Man-made Fibers (SIC 2824) are parts of the Chemical & Allied Products Industry (SIC 28).

Textile Mill Products Industry (SIC 22) includes mills engaged in any of the following operations: (1) preparation of fiber and manufacture of yarn, thread, braids, twine, cordage; (2) manufacture of knit and woven fabrics and of carpets and rugs from yarn; (3) dyeing and finishing operations; (4) coating, waterproofing, special treating of fabrics; (5) the integrated manufacture of knit apparel and other finished articles from yarn; (6) the manufacture of felt goods, lace goods, non-woven fabrics and miscellaneous textiles.

Apparel & Other Textile Products (SIC 23) (the cutting-up and needle trades) includes establishments producing clothing and fabricated products by cutting and sewing purchased woven or knit textile fabrics and related materials, such as leather, plastics, fur, etc. Besides clothing, the industry includes manufacturers of curtains and draperies, household textiles, canvas products and other fabricated textiles, which are covered by the three digit code 239. As noted, knitwear made in knitting mills (rather than cut and sewed) is classified in SIC 22.

** The value added by manufacture is derived by subtracting the cost of materials, supplies, energy, contract work, etc., from the value of shipments of products manufactured plus receipts for services rendered. The result is then adjusted upward with the addition of merchandising costs. The value added figure avoids the duplication in the value of shipments which results from the use of products of some establishments as materials by others.

(footnotes continued)

GENERAL STATISTICS

(Footnotes continued)

*** The value of industry shipments includes for all establishments classified within each industry (a) the value of products primary to the industry; (b) the value of all secondary products which are primary to other industries; and (c) miscellaneous receipts (contract work, etc.) and resales. The value of shipments of a product basis, including the output of both primary and secondary producers, is covered in the section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977;
Annual Survey of Manufactures, 1980, 1981; County Business
Patterns, 1980, 1981 (number of establishments).

Number of Companies & Mills/Plants in Specified Industries (Classified on the Basis of Primary Products) and Value of Industry Shipments

	Number			Industry Shipments (Mil. $)*	
	Companies	Mills/Plants			
	1977	1981**	1977	1981	1977
Fibers (man-made)					
Fibers, cellulosic man-made	20	25	25	$1,424.0	$1,002.8
Organic fibers, noncellulosic	37	60	66	9,602.2	6,379.7
Textile mill products	5,733	6,618	7,202	50,262.2	40,550.5
Yarn & thread mills	529	680	798	7,693.9	6,114.4
Weaving mills, cotton	211	286	314	5,284.8	4,431.4
Weaving mills, man-made fibers, silk	267	460	449	8,725.7	6,325.9
Weaving/finishing mills, wool	153	130	165	844.2	583.3
Narrow fabric mills	291	296	335	941.5	682.9
Knitting mills	2,318	2,150	2,617	10,981.4	9,470.0
Textile finishing, except wool	602	653	678	4,769.2	3,994.3
Floor covering mills	533	492	592	5,909.2	4,774.5
Miscellaneous textile goods	1,150	913	1,254	5,085.5	4,173.9
Apparel, other textile products	23,754	21,890	26,505	49,822.9	40,245.1
Men's & boys' clothing (suits, coats)	619	551	737	3,024.2	2,767.5
Men's & boys' furnishings, nightwear, underwear, workwear, etc.	2,121	2,536	3,013	12,574.9	10,003.2
Women's outerwear	11,121	7,859	11,834	16,093.0	12,720.3
Women's & children's underwear, nightwear	693	753	878	3,216.9	2,430.8
Children's outerwear	844	785	1,002	2,143.1	1,717.3
Hats, caps, millinery	381	352	409	634.7	359.5
Fur goods	620	477	620	533.6	383.4
Miscellaneous apparel	1,207	1,035	1,284	2,083.4	1,649.5
Miscellaneous fabricated textile products	6,444	5,783	6,728	9,519.1	8,213.2

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* Value of shipment totals include for all establishments classified in the industry (a) value of products primary to the industry; (b) value of all secondary products which are primary to other industries; and (c) value of miscellaneous receipts (contract work, etc.) and resales.

** From County Business Patterns, 1981.

Source: U.S. Bureau of the Census, Annual
Survey of Manufactures, 1981;
Census of Manufactures, 1977.

GENERAL STATISTICS

Employment & Earnings

Current information on industry employment and earnings is developed by the Bureau of Labor Statistics, U.S. Department of Labor, which differs from figures reported by the Census Bureau in the surveys of manufactures due to differences in methods used in compiling the data.

The total output of the U.S. textile/apparel complex has continued to expand while direct employment and average number of hours worked have been on the decline. Overall, the complex is labor-intensive, with about 85% of employment classified as production workers compared with a U.S. average for all manufacturers of 68% last year.

Within the complex, apparel is the most labor intensive and fragmented, the least capital intensive. Constant changes in fashions, in fabric weights and the many separate sewing operations for a single garment have made it difficult for the apparel industry to automate or to adopt other technological advances to the extent underway in the fiber/textile segments. However, as larger firms take hold in the apparel industry, technical knowledge and capital expenditures are gaining.

Overall, about 2 million employees work in the fiber/textile/apparel complex, or about 10.6% of total employment in U.S. manufacturing in 1983. A few years ago the complex accounted for one in eight manufacturing employees; however, it is still the top industrial complex in terms of number of production workers. Women accounted for 81% of all workers in the apparel industry in 1982 and 22% of those in the textile industry. Combined, textile/apparel manufacturing employed 22% of all women in manufacturing industries last year. The high level of employment of women, plus the movement of employment toward the South where wages are generally lower, as well as the decline in demand for domestic products, has resulted in the relatively low average earnings in textile and apparel manufacturing.

Total employment in the textile mill products industry in 1982 averaged 750,100, continuing the steady decline from a peak of 1,332,000 in 1948. Production workers numbered 642,600, down 9.8% compared with 1981. In the apparel and related products industry, total employment averaged 1,163,700, down 12.6% from the 1978 level.

GENERAL STATISTICS

Employment & Earnings

Production workers averaged 983,800, 7.1% below the 1981 level. Overall, in all manufacturing operations in the U.S., production worker employment averaged 8.8% below the 1981 level in 1982.

Employment has picked up moderately in 1983 with an upturn in the economy. In August, the seasonally adjusted employment total for the textile mill products industry was reported by the BLS at 754,000, up 2.4% over the year-ago total but 9.7% below the pre-recession peak of 835,000 employees in July 1981. Employment levels at a seasonally adjusted rate in the apparel and related products industry lost some ground in August compared with July 1983, and were reported at 1,178,000. This was 2.3% above the August 1982 figure.

Unemployment rates have been improving. In September 1983, according to the BLS, the rate in the apparel industry fell to 9.6%, the lowest level since March 1980; in the textile industry the unemployment rate was reported at 8.6%, the lowest level since the 8.5% rate in July 1981. Overall, the unemployment rate for the total civilian work force was 9.3% in September.

Employment & Earnings In Fiber/Textile/Apparel Industries, 1982, 1980

	Annual Average Employment (Thousands)		Production Workers			
			Average Weekly Earnings		Average Weekly Hours	
Industry	1982	1980	1982	1980	1982	1980
Organic fibers, noncellulosic*	78.5	93.5	$377.50	$315.79	40.0	40.8
Textile mill products industry	750.1	847.7	218.63	203.31	37.5	40.1
Selected components:						
Weaving mills, cotton	128.7	150.0	223.94	215.78	37.2	41.1
Weaving mills, man-made fibers	95.6	116.2	229.77	216.77	37.3	40.9
Knitting mills	203.6	220.4	198.01	182.31	36.6	38.3
Textile finishing, exc. wool	65.5	73.7	240.48	219.91	38.6	40.8
Yarn & thread mills	110.7	125.0	204.78	190.40	37.3	39.4
Apparel & other textile products	1,163.7	1,263.5	180.44	161.42	34.7	35.4
Selected components:						
Men's & boys' suits & coats	74.8	77.2	209.75	192.24	34.9	36.0
Men's & boys' furnishings	323.5	361.8	168.26	153.55	35.2	36.3
Women's outerwear	386.9	416.7	169.29	153.51	33.0	33.3
Women's, children's undergarments	83.5	89.5	162.97	149.40	34.6	36.0
Children's outerwear	62.1	64.4	166.85	151.20	35.2	36.0
Misc. apparel, accessories	49.5	56.0	183.73	161.73	35.4	36.1
Misc. fabricated textile prods.	164.0	175.6	231.62	192.51	37.6	37.6

* Data not reported for cellulosic fiber producers.

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Employment & Earnings (supplement) July, 1983

GENERAL STATISTICS

Ranking of the Textile & Apparel Industries

The fiber/textile/apparel complex is the nation's largest industrial employer. In terms of dollar volume, because of duplication in value of shipments within the complex--with shipments of some producers (fibers, for example) used in the manufacture of other products (fabrics)--overall rank is best determined on the basis of value added by manufacture within each segment of the complex.

In the following table, adjustments have been made in the composition of the textile apparel industries as defined by the government in order to arrive at a more precise measurement on an end-use basis. Specifically, man-made fibers have been taken from the chemical industry and are included in the textile mill products industry; knitwear has been transferred from textile mill products to apparel; household textiles and miscellaneous fabricated textiles have been separated from apparel and added to textiles. This has resulted in some unavoidable, but relatively small, duplication in the textile industry's value of shipments.

The Rank of Leading U.S. Industries Based on Value Added by Manufacture, 1981

Industry	Value Added by Manufacture**		Value of Industry Shipments	
	Bil. $	Rank	Bil. $	Rank
Machinery, except electric	$111.4	1	$201.5	4
Transportation equipment	82.9	2	205.2	3
Food & kindred products	80.8	3	272.1	1
Chemicals & allied products	80.0	4	180.5	5
Electric, electronic equipment	79.7	5	140.2	7
Fabricated metal products	61.6	6	123.7	8
Primary metal industries	49.6	7	141.6	6
Printing & publishing	49.4	8	77.3	10
Paper & allied products	32.4	9	80.2	9
Instruments & related products	31.5	10	48.3	14
Petroleum & coal products	26.7	11	224.1	2
Rubber & misc. plastic products	26.0	12	53.2	11
Apparel, incl. knitwear	25.6	13	49.8	13
Stone, clay & glass products	24.9	14	48.0	15
Textile mill products, incl. fibers & misc. fabricated textiles	19.4	15	50.3	12

**This measure of manufacturing activity is derived by subtracting the cost of materials, supplies, fuel, etc., and contract work from the value of product shipments, plus receipts for services. This calculation is adjusted for value of merchandising operations as well as inventories.

Source: Based on U.S. Bureau of the Census,
Annual Survey of Manufactures, 1981.
April 1983.

The aggregate value added by manufacture among manufacturers classified in fiber/textiles/apparel amounted to $45.0 billion in 1981, ranking this industrial complex ninth among all U.S. manufacturing industries based on this measurement.

INDUSTRY CONCENTRATION

The fiber/textile/apparel industrial complex is the nation's largest employer in manufacturing, accounting for about one out of 10 industrial employees. Although it is made up of many small and medium-sized companies and relatively few giants, these giants--particularly in the textile industry--represent a large share of shipments.

According to the American Textile Manufacturers Institute there are approximately 5,000 textile firms (SIC 22), not including man-made fiber producers in the country, of which the largest 50 firms account for 50% of the industry's total output. Of the 6,168 plants classified in the industry in 1981, only 14% had 250 or more employees, but these large plants accounted for 67% of total industry employment.

Apparel industry has traditionally been made-up of small, frequently family-operated companies with less than 100 employees, producing narrow product lines. The industry is, however, undergoing changes. The larger firms' share of output has been increasing; the capital and knowledge intensity of the industry has widened and product lines are expanding.

Of the 21,800 plants in the apparel and related textile products industry in 1981, 73% had under 50 employees. However, there is a great turnover rate among the smaller manufacturers, and they are accounting for a decreasing share of the total industry pie. Competitive pressure from imports is forcing consolidation and greater efficiency.

According to an apparel industry analysis by Kayser-Roth, in 1982 about 20% of total industry volume was in the hands of very large companies doing more than $100 million. These large companies accounted for only about 15% of all companies in the industry. It was estimated that by 1990, these same firms would control over 50% of apparel industry volume. (Women's Wear Daily, Feb. 1, 1983)

A detailed report on concentration ratios in manufacturing was compiled as a by-product of the Census of Manufactures, 1977 and findings were reported by the Census Bureau in May 1981. Selected data from this report is covered in the following table.

Concentration of Industry Shipments & Receipts In Major Components Of The Fiber/Textile/Apparel Complex, 1977

	Industry Shipments (Mil. $)	Share of Total			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Man-Made Fiber Industry					
Organic fibers, non-cellulosic	$6,379.7	78.1%	90.3%	99.3%	100.0%
Textile Mill Products Industry					
Weaving mills, cotton	4,431.2	38.6	58.1	79.0	94.9
Weaving mills, man-made & silk	6,325.9	41.7	58.0	75.6	90.2
Weaving & finishing mills, wool	583.3	30.7	46.7	74.1	95.1
Narrow fabric mills	682.9	16.7	27.8	48.2	72.7

(continued)

INDUSTRY CONCENTRATION

Concentration of Industry Shipments & Receipts In Major Components Of The Fiber/Textile/Apparel Complex, 1977

Textile Mill Products Industry (continued)	Industry Shipments (Mil. $)	Share of Total 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Women's hosiery, except socks	$ 871.2	49.7%	61.6%	78.2%	93.8%
Finishing plants, cotton	759.5	28.7	47.3	75.3	93.2
Woven carpets & rugs	138.7	67.9	80.7	94.7	99.5
Yarn mills, exc. wool	3,864.9	19.3	31.4	51.2	74.7
Felt goods, exc. woven felt, hats	197.7	58.3	81.3	98.2	100.0
Apparel & Related Products Industry					
Men's & boys' suits & coats	2,767.5	21.0	32.3	47.5	66.6
Men's & boys' shirts & nightwear	2,934.6	17.3	27.5	47.7	54.9
Women's & misses' blouses & waists	2,333.6	11.7	18.1	30.0	46.8
Women's & children's underwear	1,780.8	21.5	29.2	42.7	64.2
Millinery	75.1	18.7	27.8	48.2	78.8
Children's dresses & blouses	824.7	15.4	23.8	40.6	64.0
Fur goods	383.4	10.9	18.6	31.2	50.9
Fabric dress & work gloves	312.4	44.5	63.1	82.4	95.8
Curtains & draperies	1,013.1	25.7	36.7	49.9	62.6

* Data not reported for cellulosic fiber producers.

Source: U.S. Bureau of the Census,
Concentration Ratios in Manufacturing,
MC77-SR-9.

Textile Mills & Apparel/Related Products Manufacturing Plants (Selected Types) By Employment Size Class, 1981

	Total Number	%	% of Total By Employment-Size Class Under 50	50-99	100-249	250-499	500 & over
Textile mill products, total							
Mills	6,168	100.0	58.2	12.1	15.3	8.3	6.1
No. of employees	801,397	100.0	7.[illegible]	6.8	19.2	22.6	44.1
Selected types:							
Weaving mills, cotton							
Mills	286	100.0	40.6	5.9	10.1	17.5	25.9
No. of employees	109,494	100.0	1.5	1.1	4.6	16.9	75.9
Weaving mills, man-mades							
Mills	460	100.0	39.2	8.5	14.3	16.7	21.3
No. of employees	136,248	100.0	1.8	2.0	8.4	21.4	66.4
Knitting mills							
Mills	2,150	100.0	62.7	13.3	13.7	6.5	3.8
No. of employees	219,507	100.0	10.9	9.5	21.5	22.3	35.8

(continued)

INDUSTRY CONCENTRATION

Textile Mills & Apparel/Related Products Manufacturing Plants (Selected Types)
By Employment Size Class, 1981
(continued)

Selected types: (cont'd.)	Total Number	Total %	% of Total By Employment-Size Class: Under 50	50-99	100-249	250-499	500 & over
Textile finishing, except wool							
Mills	653	100.0	63.7	13.8	12.6	5.8	4.1
No. of employees	63,706	100.0	10.1	10.5	20.8	22.4	36.2
Yarn & thread mills							
Mills	680	100.0	30.1	13.4	34.4	15.3	6.8
No. of employees	123,790	100.0	2.9	5.5	31.6	28.8	31.2
Apparel & other textile products, total							
Plants	21,890	100.0	72.9	12.5	10.1	3.5	1.0
No. of employees	1,229,009	100.0	20.1	16.4	28.7	20.9	13.9

Note: Includes only establishments with payrolls.

Source: Based on U.S. Bureau of the Census, County Business Patterns, 1981.

Leading Companies

Leading Fiber Companies: Sales & Net Income, 1981, 1982
(Millions of Dollars)

	Sales 1982	Sales 1981	% Change 1982/1981	Net Income 1982	Net Income 1981	% Change 1982/1981
Du Pont*	$33,331	$33,000	- 1.0%	$ 894	$1,401	- 36.2%
Monsanto	6,325	6,947	- 9.0	370	445	- 16.9
Allied Corp.	6,170	6,410	- 3.8	617	834	- 26.0
American Cyanamid	3,454	3,649	- 5.4	132	197	- 33.0
Celanese	3,062	3,752	- 18.4	(34)	144	--
Total	52,342	53,758	- 2.6	1,979	3,021	- 34.5

Source: Daily News Record (February 17, 1983)

INDUSTRY CONCENTRATION

Leading Companies

Leading Publicly-Owned Textile Companies: Sales & Net Income, 1981, 1982
(Millions of Dollars)

	Sales		Net Income	
	1982	1981	1982	1981
Burlington*	$2,775.6	$3,276.2	$ 40.6	$115.5
J.P. Stevens*	1,784.9	2,033.3	7.6	(38.5)
West Point Pepperell	1,103.3	1,212.7	44.2	39.2
Springs Industries	874.6	917.0	43.1	40.0
Collins & Aikman	657.2	675.4	21.0	18.6
Fieldcrest	492.0	526.2	10.4	9.5
Cone Mills	608.2	667.5	12.8	33.7
Lowenstein	536.7	601.3	15.5	17.4
Dan River	519.1	634.8	(8.7)	14.5
Riegel Textiles*	408.5	436.0	9.8	20.0
Avondale*	260.8	282.4	2.9	2.3
Graniteville	256.6	343.2	(9.8)	(2.0)
The Bibb Co.*	235.2	247.3	5.3	2.4
Total	10,512.4	11,853.3	194.6	272.8

( ) = parenthesis denote a loss.

* = Fiscal periods have been adjusted to closely coincide with the calendar year.

Note: Milliken is not listed as it is privately held, but has sales of well above $2 billion a year.

Source: Daily News Record, March 17, 1983

Leading Apparel Companies (Publicly-Owned)
Sales & Net Income, 1979, 1982
(Millions of Dollars)

	Sales*		Net Income*	
	1982	1979	1982	1979
Levi Strauss	$2,572.2	$2,103.1	$126.6	$191.5
Blue Bell	1,292.2	1,029.5	37.3	67.3
Consolidated Foods	1,017.0	236.0	74.0	nr
Gulf + Western	925.0	449.4	nr	nr
Interco	899.2	731.3	104.8	nr
V F Corporation	879.5	544.3	91.6	38.8
Cluett Peabody	867.4	671.6	23.7	17.3
General Mills	657.3	275.0	101.7	nr
Northwest Industries	642.4	492.0	81.8	nr
Kellwood Company	606.8	521.1	8.2	4.4
Warnaco	493.6	448.3	24.1	16.6
Palm Beach Co.	491.0	323.7	9.5	13.8
Hartmarx	490.2	239.7	57.1	nr

(continued)

INDUSTRY CONCENTRATION

Leading Companies

Leading Apparel Companies (Publicy-Owned)
Sales & Net Income, 1979, 1982
(Millions of Dollars)

	Sales*		Net Income*	
	1982	1979	1982	1979
Oxford Industries	$ 435.9	$ 253.3	$ 16.3	$ 6.9
Phillips-Van Heusen	431.1	327.0	7.3	8.9

* Includes only apparel manufacturing sales volume and income.

nr = not reported.

Source: Kurt Salmon Associates, Inc.

FINANCIAL RESULTS

Based on information issued by the Federal Trade Commission, net sales of corporations in the textile mill products industry in 1982 declined 13.7% compared with 1981, reaching $48.3 billion. Net profits were down 26.4% in 1982.

In the first quarter of 1982, textile mill products industry profits on sales slipped to 1.1%, down from 1.7% in the previous quarter. In the first quarter of 1983, profits had improved to 2.3%, then rose to 3.9% of sales in the second quarter of 1983.

An analysis of results of 48 public textile companies by Kurt Salmon Associates showed a 9.3% drop in composite net sales in 1982 compared with 1981 as the recession took its toll. After-tax income before a one-time adjustment for extraordinary items was 47% lower than in 1981. One out of every four companies profiled reported a loss for 1982.

In spite of the severe recession, the apparel companies analysed by Kurt Salmon (66 publicly-held firms) managed a profit gain of 2.3% while sales were up by only 0.2%--matching the gain in wholesale apparel prices for the year. A rise in selling, general and administrative expenses brought total operating earnings in 1982 to a level 8.4% below 1981.

Textile Mill Products	Annual Average		1st Qtr.		2nd Qtr.	
	1982	1981	1983	1982	1983	1982
Net profits after taxes						
Per dollar of sales	2.1%	2.4%	2.3%	1.1%	3.9%	1.4%
On total assets	3.7	4.7	4.1	1.8	7.3	2.5
On stockholders' equity	6.9	9.4	7.8	3.7	14.2	4.8

Source: American Textile Mfrs. Institute, based on Dept. of Commerce Quarterly Financial Reports.

FINANCIAL RESULTS

While composite results on industry performance may be helpful for some purposes, it should be noted that the textile industry in particular, as well as the apparel industry, is composed of many different types of manufactures, with different cyclical patterns and subject to different pressures in terms of imports, changes in demographic patterns, housing starts, auto sales, etc.

Industry Segment Results, 1981, 1982
(Based On An Analysis of 48 Top Performing Textile Companies, 66 Apparel Companies)

	% Change in Sales	% Net After Tax Income On Sales		% Return on Total Equity	
	1982/1981	1982	1981	1982	1981
Textiles-composite	- 9.3%	2.35%	2.65%	6.72%	8.54%
Yarns (spun & textured)	- 3.5	2.73	3.46	2.73	3.46
Home consumer products	- 3.3	1.52	1.90	6.17	8.20
Fabrics	- 14.3	3.40*	2.82	8.60	8.86
Diversified	- 9.0	2.02	2.43	5.84	7.75
Other textile products	- 9.7	2.67	4.69	6.15	11.63
Apparel-composite	+ 0.2	3.43	3.36	11.87	12.27
Women's wear	+ 4.1	2.33	1.79	9.12	7.08
Men's wear	+ 2.5	2.37	1.78	9.18	7.09
Diversified	- 1.3	4.22	4.37	13.69	15.23

* = 1.05 before extraordinary items.

Source: Kurt Salmon Associates, Inc.

INDUSTRY LOCATION

Textile Mill Products

Employment in the textile industry has moved southward over the post-World War II period. Presently the greatest concentration of mills is in the Carolinas and Georgia which, combined are estimated to account for 60% of the industry's employment.

The latest official government data on employment by state and region in the textile mill industry is covered below.

INDUSTRY LOCATION

Textile Mill Products

Textile Mill Industry by Leading States

	No. of Mills	Employment (Thousands)		Value Added by Manufacture (Millions of $)	
	1977	1978	1977	1978	1977
North Carolina	1,375	243.4	245.3	$4,605.9	$4,267.4
South Carolina	434	133.9	139.1	2,699.8	2,468.3
Georgia	695	116.3	116.6	2,579.7	2,433.8
Virginia	101	44.2	43.0	922.0	850.1
Pennsylvania	542	45.7	46.8	900.8	803.8
Alabama	178	38.8	42.3	745.5	685.4
New York	1,250	42.2	43.0	663.0	756.9
Massachusetts	285	27.1	26.3	594.0	522.2
New Jersey	532	23.7	23.4	475.0	453.1
Tennessee	172	27.9	27.1	435.9	426.5
Rhode Island	201	13.3	12.8	262.3	215.9
Ohio	86	6.1	7.2	167.0	182.2
Leading States total	5,851	759.6	772.9	15,051.2	13,308.7
U.S. Total	na	861.8	875.7	17,130.9	16,104.5
Leading States percent of U.S. Total	na	88.1%	88.3%	87.6%	82.6%

na = not available

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1978
M(78)-AS(6) (September 1981)

The Textile Mill Products Industry by Region, 1972, 1977

	No. of Mills		Employment (Thous.)		Value Added by Mfr. (Mil. $)	
	1977	1972	1977	1972	1977	1972
U.S. Total	7,202	7,203	875.7	952.7	$16,104.5	$11,718.0
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Regions						
New England	10.1	11.5	7.6	8.0	7.8	8.4
Middle Atlantic	32.4	35.8	13.4	15.4	12.9	16.5
East North Central	3.8	3.8	2.3	2.5	3.1	3.4
West North Central	0.5	0.9	0.4	0.4	0.4	0.4
South Atlantic	38.7	36.4	62.8	61.1	63.2	59.1
East South Central	5.6	5.3	9.5	9.4	8.3	8.4
West South Central	2.3	1.7	1.8	1.4	1.8	1.4
Mountain	--	0.4	--	--	--	0.2
Pacific	6.6	4.3	2.2	1.5	2.5	2.2

Source: Based on U.S. Bureau of the Census,
1977 and 1972 Census of Manufactures.

INDUSTRY LOCATION

Apparel & Other Textile Products

The U.S. Department of Commerce reported in the 1983 Industrial Outlook apparel plants are located in every state, but 59% are located in New York, California, Pennsylvania and New Jersey. New York remains by far the largest state for employment and value added by manufacturer, accounting for 15% of total industry employment and 19.4% of value added in apparel manufacturing.

Sectors of the industry that produce clothing requiring intricate manufacturing operations and frequent style changes are generally located in the Middle Atlantic states and California, according to the U.S. Department of Commerce. Industries that are basic and require fewer changes are more commonly reported to be in Southern states.

The Apparel & Other Textile Products Industry, by Leading States

	No. of Mills	Employees (thousands)		Value Added by Manufacture (Millions of $)	
	1977	1978	1977	1978	1977
New York	7,824	198.4	214.4	$4,134.9	$3,888.9
California	4,288	105.3	101.1	1,998.9	1,770.5
Pennsylvania	1,978	130.5	132.6	1,680.4	1,605.8
Georgia	620	76.9	76.2	1,115.1	992.4
Texas	922	75.1	73.4	1,092.3	1,038.7
North Carolina	700	78.0	77.1	1,024.5	851.9
Tennessee	443	71.0	69.9	932.4	919.1
Michigan	241	25.9	25.5	901.1	820.6
New Jersey	1,924	55.5	59.7	896.4	861.9
Alabama	345	53.1	53.9	729.8	625.3
Massachusetts	768	40.6	42.4	672.8	678.6
Virginia	287	36.5	37.0	574.3	475.6
Leading States total	20,340	946.8	963.0	15,287.0	14,529.5
U.S. total	na	1,321.8	1,334.3	21,287.0	19,671.3
Leading states percent of U.S. total	na	71.6%	72.2%	74.0%	73.9%

na = not available.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1978

Over the past twenty years the general trend in the apparel industry has been for the relocation of plants away from the Middle Atlantic states toward the South. According to a study by Kayser-Roth (WWD 2/1/83), the Middle Atlantic region has registered a decline of 33% in apparel employment between 1968 and 1983. Southern states, on the other hand, have increased apparel employment by 23% during this same period. This study projects that by 1993, employment in the Middle Atlantic region will be 50% lower than at present, while Southern apparel employment will fall 14%. These estimates reflect an expected 20% drop in apparel industry employment overall.

INDUSTRY LOCATION

Apparel & Other Textile Products

The latest official government information on employment in the apparel industry comes from the U.S. Bureau of the Census and covers the years 1977 and 1972, as covered below.

The Apparel & Other Textile Products Industry by Region, 1972, 1977

	No. of Plants		Employment (Thousands)		Value Added by Mfr. (Mil. $)	
	1977	1972	1977	1972	1977	1972
U.S. Total	26,505 100.0%	24,438 100.0%	1,344.4 100.0%	1,368.3 100.0%	$19,671.3 100.0%	$13,487.5 100.0%
Regions						
New England	4.7	5.3	4.7	5.1	5.0	5.4
Middle Atlantic	44.4	51.6	32.2	34.6	33.4	38.2
East North Central	5.7	6.3	6.6	6.7	9.8	9.1
West North Central	3.0	3.0	3.6	3.6	3.6	3.6
South Atlantic	13.3	11.7	21.0	21.4	17.7	18.2
East South Central	4.4	3.9	14.1	13.1	12.0	10.8
West South Central	5.0	4.1	8.0	7.4	7.3	6.2
Mountain	1.5	1.3	1.4	1.1	1.3	0.9
Pacific	18.0	12.8	8.4	7.0	9.9	7.6

Source: Based on U.S. Bureau of the Census, 1977 and 1972 Census of Manufactures.

New York City

Despite a drop of 5.5%, or 8,000, in the number employed last year, the apparel and related products industry is still the largest employer in manufacturing in New York City. In 1982, employment in the industry averaged 129,200, according to the New York State Department of Labor, compared with 137,200 in 1981 and 140,200 in 1980.

The decline followed nationwide industry trends, and New York City's share of total apparel industry employment was the same, at 11%, in both 1982 and 1980. The industry in New York City accounted for 28.2% of total manufacturing employment and 3.8% of all employees in the city in 1982.

Broadly defined--including apparel, accessories and toiletries--the fashion industry in New York City is rated as the third largest employer, behind business services (advertising, marketing, management consulting) and wholesale trade. (Women's Wear Daily, May 12, 1983)

FIBER/PRODUCTION/CONSUMPTION

The Textile Economics Bureau reported that in 1982, domestic production of man-made fibers fell dramatically from the levels recorded in 1981. The 7.9 billion pounds of man-made fiber produced in 1982 was 19.1% less than the total recorded in the previous year, according to the TEB.

Due to the combination of improved demand as 1983 continues, and plant closings during the recent recession, the U.S. man-made fiber industry is experiencing a sharp increase in capacity utilization rates with most analysts forecasting a bright future in the industry. The Federal Reserve Board index on production for August 1983 was up 1.2% compared with the previous month and 25.9% over the August 1982 level.

Many analysts agree that the total poundage of man-made fibers produced in 1983 will fall short of the record for 1981 due to the loss of 350 million pounds of capacity in noncellulosic fibers in 1982 (a decline of 3.7%). In the April/May period of 1983, the shipment-to-capacity ratio for all man-made fibers was 80%, about 10% more than the 1982 average. Although this increase is credited primarily to inventory replenishment, many analysts expect increased retail demand to allow producers to remain at least at this level (Daily News Record, June 14, 1983).

Generally, trade observers expect fiber consumption in 1983 to be well above 1982, but the annual total is expected to fall about 1 billion pounds short of the 12.5 billion market set in 1973 and repeated in 1979.

Market sources indicate that capacity usage among U.S. man-made fiber producers continued strong in September 1983, at an average of 85.4%. In September of 1982, the capacity utilization rate was at only 71.7%. This capacity utilization puts man-made fiber producers at a higher rate than the total for all industries which the Federal Reserve Board reported to be at the 78.1% level in September 1983. The gain in capacity utilization has been achieved despite mixed results in specific fiber categories for the month. Six measured categories registered production gains, five recorded declines and one, nylon staple, continued to show full capacity usage specifically due to the strong performance of the residential carpet market.

U.S. Man-made Fiber Production, 1981, 1982, 1st Qtr. 1983/1982
(Millions of Pounds)

	January-March		% Change Jan./Mar.			% Change
	1983	1982	1983/1982	1982	1981	1982/1981
Total	na	na	--	7,943.5	9,817.1	- 19.1%
Cellulosic total	na	na	--	584.4	770.1	- 24.1
Yarn	na	na	--	228.4	305.5	- 25.2
Rayon	na	na	--	33.2	48.5	- 31.5
Acetate	50.3	52.9	- 4.9%	195.2	257.0	- 24.0
Staple & tow	na	na	--	356.0	464.4	- 23.3
Rayon	92.6	96.2	- 3.7	355.0	460.6	- 22.9
Acetate	na	na	--	1.0	4.0	- 75.0

(continued)

U.S. Man-made Fiber Production, 1981, 1982, 1st Qtr. 1983/1982
(Millions of Pounds)
(continued)

	January-March		% Change Jan.-Mar.			% Change
	1983	1982	1983/1982	1982	1981	1982/1981
Noncellulosic, total	1,687.8	1,650.0	--	6,459.9	8,005.9	- 19.3%
Yarn & monofilaments	801.1	785.4	--	3,057.4	3,814.8	- 19.9
Nylon	311.5	299.9	+ 3.9%	1,241.6	1,580.7	- 21.4
Olefin	166.8	154.3	+ 8.1	585.2	642.9	- 9.0
Polyester	322.8	331.5	- 2.6	1,213.6	1,569.2	- 22.7
Other	--	--	--	17.0	22.0	- 22.7
Staple, tow & fiberfill	886.7	864.6	+ 2.6	3,402.5	4,191.1	- 18.8
Nylon + aramid	196.4	140.5	+ 39.8	685.0	751.8	- 8.9
Acrylic + modacrylic	160.4	149.6	+ 7.2	624.1	690.8	- 9.7
Polyester	492.0	528.7	- 8.7	1,955.2	2,606.5	- 25.0
Olefin + vinyon	37.9	35.8	+ 5.9	138.2	142.0	- 2.7
Textile glass fiber	245.1	207.6	+ 18.1	899.2	1,041.1	- 13.6

na = not available

Source: Textile Economics Bureau, Textile Organon (March, 1983).

U.S. Consumption of Fibers 1978-1982
Total, Per Capita & Percentage Distribution by Fiber

	Mill Consumption #			Domestic Consumption ##		
	Total (mil. lbs.)	Share of Fibers	Per Capita (lbs.)	Total (mil. lbs.)	Share of Fibers	Per Capita (lbs.)
Total, all fibers*						
1978	12,389.4	100.0%	55.7	13,190.9	100.0%	59.3
1979	12,656.5	100.0	56.2	12,920.7	100.0	57.4
1980	11,928.4	100.0	52.4	12,055.9	100.0	53.0
1981	11,562.0	100.0	50.3	12,264.1	100.0	53.4
1982(p)	10,143.5	100.0	43.7	11,136.7	100.0	48.0
Cotton						
1978	3,040.6	24.5	13.7	3,528.7	26.8	15.9
1979	3,077.2	24.3	13.7	3,343.5	25.9	14.9
1980	3,036.4	25.5	13.3	3,319.1	27.5	14.6
1981	2,715.5	23.5	11.8	3,310.1	27.0	14.4
1982(p)	2,487.9	24.5	10.7	3,131.7	28.1	13.5

(continued)

U.S. Consumption of Fibers 1978 - 1982
Total, Per Capita & Percentage Distribution by Fiber

(continued)

	Mill Consumption #			Domestic Consumption ##		
	Total (mil. lbs.)	Share of Fibers	Per Capita (lbs.)	Total (mil. lbs.)	Share of Fibers	Per Capita (lbs.)
Wool						
1978	115.3	0.9%	0.5	235.1	1.8	1.0
1979	117.0	0.9	0.5	214.1	1.7	1.0
1980	123.4	1.0	0.5	212.7	1.8	0.9
1981	138.6	1.2	0.6	239.9	2.0	1.0
1982(p)	114.8	1.1	0.5	215.1	1.9	0.9
Rayon & acetate						
1978	870.6	7.0	3.9	898.4	6.8	4.0
1979	822.6	6.5	3.7	824.6	6.4	3.7
1980	733.0	6.2	3.2	720.8	6.0	3.2
1981	701.3	6.1	3.1	724.8	5.9	3.1
1982(p)	515.5	5.1	2.2	542.5	4.9	2.3
Noncellulosic man-made fibers**						
1978	8,357.1	67.6	37.5	8,528.6	64.7	38.3
1979	8,623.1	68.3	38.3	8,548.4	66.1	38.0
1980	8,027.1	67.3	35.3	7,803.3	64.7	34.3
1981	8,001.1	69.2	34.8	7,989.3	65.1	34.8
1982(p)	7,014.9	69.3	30.2	7,247.3	65.1	31.2

(p) preliminary

* Total includes flax and silk

** Includes manufactured waste

# "Mill" consumption of cotton is the net weight of running bales. Wool data include apparel and carpet wool scoured basis. Rayon and acetate data and noncellulosic man-made fiber data (including glass) are producers shipments plus imports for consumption.

## "Domestic" consumption refers to mill consumption adjusted for raw fiber equivalent of U.S. trade in textile manufactures. Rayon & acetate data and noncellulosic man-made fiber include fiber waste.

Source: U.S. Department of Agriculture,
Cotton & Wool Outlook & Situation
June 1983, CWS-35.

Summary of Mill Consumption By Fiber
(Billion pounds)

	1970	1975	1980	1982	Highest Year
Rayon	0.9	0.5	0.5	0.3	1973
Acetate	0.5	0.3	0.3	0.2	1970
Nylon	1.3	2.0	2.3	1.9	1979
Polyester	1.6	3.1	3.5	2.9	1979
Acrylic	0.5	0.5	0.6	0.5	1977
Olefin	0.2	0.5	0.7	0.8	1982
Glass	0.4	0.5	0.9	0.9	1981
Cotton	3.8	3.1	3.1	2.5	1971
Wool	0.3	0.1	0.1	0.1	1970
Total	9.5	10.6	12.0	10.1	1979

Source: America's Textiles (November 1983)

End-Use

Total Fiber Consumption by Category

	1981 Mils. of Pounds	1981 % of Total	% Change 1981/1980	Av. % of Total 1979 - 1981
Total	11,950	100.0%	- 2.2%	100.0%
Apparel	4,603	38.5	- 4.6	38.3
Home furnishings	3,540	29.6	- 3.2	30.4
Industrial & consumer products	3,317	27.8	+ 6.3	26.7
Exports	490	4.1	- 20.6	4.6

(continued)

End-Use

Fiber Consumption in Broad Apparel Categories & Key Home Furnishings Categories

	1981		
	Mils. of Pounds	% of Total	% Change 1981/1980
Apparel categories:	4,381.5	95.2%	- 4.1%
Bottomweight fabrics	1,844.4	40.1	- 5.3
Topweight fabrics	986.0	21.4	- 2.3
Retail piecegoods	310.5	6.7	- 2.0
Men's underwear & nightwear	238.3	5.2	- 6.3
Women's underwear, nightwear, bras & foundations	212.0	4.6	- 2.7
Fabrics for lining	192.9	4.2	+ 6.8
Men's & women's anklets & socks	184.0	4.0	- 2.3
Men's & women's sweaters & related accessories	138.0	3.0	+ 0.5
Men's & women's robes & loungewear	126.9	2.8	- 14.3
High pile fabircs	78.6	1.7	- 21.7
Women's sheer hosiery	69.9	1.5	+ 3.1
Home furnishings categories:	3,392.5	95.8	- 5.1
Carpets & rugs	1,818.6	51.4	- 5.6
Sheeting & other bedding	533.4	15.1	+ 5.0
Drapery & upholstery	474.1	13.4	- 2.8
Towels & toweling	326.7	9.2	- 0.5
Bedspreads & quilts	140.9	4.0	+ 10.0
Blankets & blanketing	90.8	2.6	- 16.8
Curtains	81.0	2.3	- 9.5

(continued)

End-Use

Percent of All Fiber Consumed in 1981 by End-Use

	Cotton	% of Total	Wool	% of Total	Man-Made	% of Total
Total	24.6%	100.0%	1.6%	100.0%	73.8%	100.0%
Apparel	34.8	54.6	3.2	76.3	62.0	32.3
Home furnishings	21.9	26.4	0.8	14.9	77.3	31.0
Industrial & consumer type products	11.8	13.3	0.4	6.2	87.8	33.1
Exports	33.9	5.7	1.0	2.6	65.1	3.6

Source for preceding three tables:
Research Div., Merrill Lynch Pierce Fenner & Smith, Inc., based on Textile Organon (Textile Economics Bureau).

PRODUCTION OF TEXTILES

Textile industry leaders have been spending heavily in their effort to stay competitive. In the past five years they have put $6 billion into revamping or replacing ageing facilities. Because of this, textile industry productivity has been rising at a rate of 4% annually--from 6.6 lbs. of fiber processed per hour in 1973 to more than 8 lbs. in 1982.

The dramatic rebound in textile industry output which started in January 1983 continued in August and September according to indexes of production compiled by the Federal Reserve Board. Output of man-made fibers in August was up 26%, on a seasonally adjusted basis, compared with the same month in 1982. Output in the textile mill industry was ahead by 24% of the August 1982 level, with the index of 149.3 surpassing the previous record set in September 1979. In December 1982 the index reached a recession-period low of 122.2; the year as a whole was the worst since 1975.

However, some industry experts contend that the Government's index overstates the strength of the current recovery in the textile industry with not all segments properly represented. (The index is slated for a technical overhaul next year, according to the Fed. Coverage of apparel has been dropped due to a lack of representative data.)

PRODUCTION OF TEXTILES

Indexes of Production
(1967=100)

	August (Seasonally Adjusted)		% Change	Annual Average		% Change
	1983	1982	1983/1982	1982	1981	1982/1981
All U.S. manufacturing	151.4	138.0	+ 9.7%	137.6	150.4	- 8.6%
Man-made fibers	249.5	198.2	+ 25.9	204.2	254.3	- 19.7
Textile mill products	149.3	120.6	+ 23.8	124.5	135.7	- 8.3
Fabrics (woven)	113.5	96.1	+ 18.1	90.9	102.7	- 11.5
Cotton	71.6	60.9	+ 17.6	60.2	66.1	- 8.9
Man-made	nr	nr	--	172.1	nr	--
Wool	nr	nr	--	47.7	nr	--
Knit goods	184.5	175.2	+ 5.3	172.3	186.6	- 7.7
Hosiery	216.4	215.0	- 0.6	212.5	229.0	- 7.2
Knit garments	168.4	155.1	+ 8.6	151.9	165.1	- 8.0
Fabric finishing	127.3	113.0	+ 12.6	117.7	141.8	- 17.0
Yarn & misc. textiles	145.7	122.4	+ 19.0	116.6	121.5	- 4.0
Carpeting	243.2	186.1	+ 30.7	182.0	186.2	- 2.3

nr= not reported.

Source: Board of Governors, Federal Reserve System (G.12.3)

The current inventory situation is favorable for the immediate future of the textile industry, according to industry analysts. From the end of 1979 to the middle of 1983 about two billion pounds were taken out of the "textile pipeline". As of June 1983, fiber shipments were running even with 1982, leaving room for the expansion of inventories in the future. (Daily News Record, June 1, 1983)

The Federal Reserve Board reported that capacity utilization in textile mills in August 1983 went up to 91.5%, gaining 1.5% over the July rate. This marked the first time in 42 months that textile mills used more than 90% of their capacity, and continued a string of eight consecutive monthly increases in textile mills' capacity utilization rates since the industry recorded its low mark of 75.5% in December 1982.

Based on mail survey within the industry, the U.S. Bureau of the Census compiles reports on major components of the textile/apparel industries which are published either monthly or quarterly, plus annual summary reports in the Current Industrial Reports Series. Highlights from these detailed reports are covered on the following pages.

PRODUCTION OF TEXTILES

Yarns

Production of Specified Yarns by Fiber & Method of Distribution, 1981, 1982
(Millions of pounds)

	1982	1981	% Change 1982/1981
Textured, crimped, or bulked filament yarns	1,748.7	2,126.8	- 17.8%
Fiber:			
Nylon	994.0	1,203.6	- 17.4
Polyester	594.2	771.9	- 23.0
Rayon, acetate, other	160.5	151.2	+ 6.1
Distribution:			
For sale	1,296.8	1,591.4	- 18.5
For own use	376.9	463.9	- 18.7
On commission	75.0	71.6	+ 4.8
Spun yarn	4,961.7	5,625.8	- 11.8
Fiber:			
Cotton or chiefly cotton	1,998.8	1,649.8	- 8.2
Wool or chiefly wool	114.9*	136.4*	- 15.9
Cellulosic or chiefly cell.	129.8	180.7	- 28.2
Noncellulosic	2,703.6	3,113.2	- 45.3
100% acrylic, modacrylic	249.7	284.8	- 12.3
100% polyester	291.6	361.0	- 19.2
Blends:			
Chiefly acrylic, modacrylic	94.7	100.7	- 6.0
Chiefly polyester with			
Cotton	1,323.5	1,530.6	- 13.5
Wool	24.9	25.0	- 0.4
Other fibers	**	**	--
100% nylon	485.8	514.5	- 5.6
Chiefly nylon	**	**	--
Other, 100% one fiber	38.4	52.4	- 25.2
Other blends	53.2	61.4	- 13.4
Other natural fibers	14.3	18.6	- 23.2
Distribution:			
For sale	1,516.5	1,650.1	- 8.1
For own use	3,404.1	3,918.4	- 13.1
On commission	41.1	57.2	- 28.1

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22F

Broad Woven Fabrics (Gray Goods)

The CIR reports on gray goods over 12 inches in width indicate a pickup in the second quarter of 1983 compared with year-ago figures and also with the previous quarter except for cotton broad woven goods where output was about even in the first two 1983 quarters (although ahead of last year).

PRODUCTION OF TEXTILES

Broad Woven Fabrics (Gray Goods)

A decline in the demand for U.S. jeans and competition from imported fabrics hurt the denim market. In 1982, production dropped to 590.3 million square yards as the downward trend from the peak of 748.9 million yards produced in 1977 continued. Denim accounts for an estimated 81% of jeans sold in the U.S. A revival in demand is noted this year, and denim output in the second quarter of 1983 gained 48% over the total in the same 1982 period.

However, cotton fabric production held up better in 1982 compared with 1981 than other fabrics, dropping only 3%. Man-made fiber fabrics dropped 22%; woolens and worsteds were off 27%.

Summary of Production of Broad Woven Fabrics, Felts & Tire Cord, 1981, 1982
& 2nd Quarter, 1982, 1983
(Gray Goods: Millions of Square Yards)

	Second Quarter		Annual Total	
	1983	1982	1982	1981
Broad woven fabrics, total	3,540.9	3,281.0	12,485.8	15,103.1
Cotton or chiefly cotton fabrics	1,046.5	939.9	3,779.2	3,912.9
Duck & allied fabrics	24.3	24.2	93.6	95.1
Sheeting & allied fabrics	140.2	130.8	510.5	678.1
Print cloth yarn fabrics	407.4	404.2	1,573.8	1,432.3
Carded colored yarn fabrics*	(D)	136.9	(D)	(D)
Denims, clothing, incl. sport denims	177.3	119.6	525.2	590.3
10 oz. & under per sq. yd.	25.2	19.7	68.9	70.5
Over 10 oz. per sq. yd.	152.1	99.9	456.3	519.8
Towels, toweling & dishcloths	119.9	113.3	434.1	489.8
Napped fabrics, blankets & blanketing	21.8	17.9	74.4	87.4
Fine cotton fabrics	(D)	44.4	(D)	120.8
Other woven fabrics & specialties	85.5	92.3	322.6	(D)
Corduroys	60.8	67.7	242.6	276.7
Man-made or chiefly man-made fabrics	2,454.2	2,281.0	8,585.5	11,025.2
100% filament yarn fabrics:				
Chiefly rayon and/or acetate	60.8	105.8	(D)	(D)
Chiefly nylon fabrics	90.9	105.5	320.9	432.5
All other filament yarn fabrics	736.4	618.6	(D)	(D)
100% spun yarn fabrics:				
Rayon & acetate	28.2	28.6	101.4	592.4
Polyester blends with cotton	956.5	905.0	3,565.4	4,320.8
All other spun yarn fabrics	283.5	261.0	1,031.9	1,307.6
Combinations & mixtures of filament & spun yarn fabrics	256.4	221.8	797.8	137.9
Silk, paper & other specialty fabrics	(S)	34.6	137.9	146.9

(continued)

PRODUCTION OF TEXTILES

Broad Woven Fabrics (Gray Goods)

Summary of Production of Broad Woven Fabrics, Felts & Tire Cord, 1981, 1982
& 2nd Quarter, 1982, 1983
(Gray Goods: Millions of Square Yards)
(continued)

	Second Quarter		Annual Total	
	1983	1982	1982	1981
Woolen & worsted fabrics (not incl. felt)	40.2	36.1	121.1	165.0
Men's & boys' clothing	16.0	16.2	55.0	76.3
Women's & children's clothing	22.0	18.3	60.5	84.0
Nonapparel fabrics	(S)	(S)	5.7	4.7
Woven felts (millions of pounds)	(S)	(S)	9.7	13.9
Tire cord & fabrics (millions of pounds)	119.2	111.6	466.7	568.8
Rayon	3.8	(D)	(D)	13.8
Nylon & polyester	93.6	88.4	362.7	479.0
Chafer & all other*	21.7	(D)	(D)	76.0

* Includes cotton, steel, glass, and all other man-made fiber cord and tire cord fabrics.
(D) Withheld to avoid disclosing figures on individual companies.
(S) Does not meet publication standards.

Source: U.S. Bureau of the Census,
Current Industrial Reports
Broadwoven Fabrics (Gray) MQ22T.

Finished Broad Woven Fabrics

The Nation's finishing plants and textile mills bleached, dyed or printed 6,600 million linear yards of broad woven goods in 1982, 11.7% below comparable figures for 1981. Finished cotton goods was down 8.9%; man-made fiber goods, down 13.3%. The backlog of finishing orders was 487 million linear yards in 1982 compared with 520 million linear yards in 1981, a drop of 6.3%.

Cotton & Man-Made Fiber Broad Woven Goods Finished
1980-1982 & Jan.-July 1983/82 % Change
By Type of Finish
(Millions of Finished Linear Yards)

	1982	1981(r)	1980	% Change** Jan.-July 1983/82
Cotton & man-made fiber broad woven fabrics finished*				
Cotton, total	2,466.0	2,707.2	2,896.0	na
Whites & plain colors	2,070.7	2,248.6	2,507.9	na
Whites	1,204.3	1,287.1	na	+ 11.0%
Plain colors	882.0	961.4	na	+ 14.2
Prints	379.7	458.6	388.0	+ 42.8

(continued)

PRODUCTION OF TEXTILES

Finished Broad Woven Fabrics

Cotton & Man-made Fiber Broad Woven Goods Finished
1980-1982 & Jan.-July 1983/82 % Change
By Type of Finish
(Millions of Finished Linear Yards)
(continued)

	1982	1981(r)	1980	% Change ** Jan-July 1983/82
Man-made, total*	4,194.1	4,834.6	4,843.5	+ 19.4%
Whites & plain colors	3,274.0	3,749.6	3,688.0	na
Prints	920.1	1,084.9	1,155.5	na

na = not available (r) = revised

* Excludes finished fabrics not bleached, dyed or printed at the reporting establishment (flameproofed, sanforized, mildewproofed, mercerized, embossed, etc.) which were reported at 23 million linear yards of cotton fabric for 1982, 36 million in 1981 and 167 million linear yards of man-made fabrics for 1982 and 170 million yards for 1981.

**Seasonally adjusted rate as reported by the ATMI.

Source: U. S. Bureau of the Census, Current Industrial Reports, MA-22S

Production & Exports of Finished Broad Woven Fabrics, 1981, 1982
(Millions of finished linear yards)

	Domestic Production	Exports of Domestic Mdse.	% Exports To Total Fabrics
1982			
Total finished fabrics	6,660.1	306.6	4.6%
Cotton broad woven fabric	2,466.0	100.5	4.1
Man-made fiber broad woven fabrics	4,194.1	206.1	4.9
1981			
Total finished fabrics	7,541.8	533.1	7.1
Cotton broad woven fabrics	2,707.2	132.0	4.9
Man-made fiber broad woven fabrics	4,834.6	401.1	8.3

Source: U.S. Bureau of the Census, Current Industrial Reports, MA-22S

PRODUCTION OF TEXTILES

Narrow Fabrics

Data on narrow fabrics is reported in terms of shipments--quantity and value--by producers rather than in terms of production.

Summary Of
Quantity & Value of Shipments (Including Interplant Transfers)
Of Woven & Braided Narrow Fabrics: 1981, 1982
(Not Over 12 Inches in Width, Made of Cotton, Wool, Silk, Man-mades)

	Unit of Measure (Mils.)	1982 Quantity	1982 Value (Thous.$)	1981 Quantity	1981 Value (Thous.$)
Narrow fabrics, total	(X)	--	$737,754	--	$763,811
Woven narrow fabrics	(X)	--	555,457	--	558,192
Elastic	Linear yards	1,371.4	190,672	1,561.6	192,662
Corset & allied lines (inches)	Linear yards	361.4	56,027	413.2	56,411
3/4 & under	Linear yards	293.9	43,053	342.9	42,764
Over 3/4 to 1½	Linear yards	56.6	7,287	58.7	7,875
1½ to 3	Linear yards	10.0	4,493	11.0	4,819
Over 3	Linear yards	0.9	1,194	0.6	953
Underwear	Linear yards	371.5	43,747	304.5	34,125
Other apparel	Linear yards	266.9	34,270	421.0	46,395
Other uses	Linear yards	371.7	56,628	422.9	55,761
Nonelastic	(X)	--	364,785	--	365,530
Ribbons, woven edge	Linear yards	729.2	66,116	624.3	54,528
Labels	Number	3,648.5	66,351	3,981.0	61,274
Tapes	Linear yards	2,374.5	89,334	2,564.2	96,578
Zipper tape	Linear yards	232.1	12,106	374.0	16,340
Apparel tape	Linear yards	766.7	31,277	786.9	32,757
Household article tapes	Linear yards	288.7	10,347	355.9	12,326
All other tape	Linear yards	1,088.0	35,604	1,047.4	35,155
Webbing	Linear yards	587.7	81,366	589.0	88,096
All other	(X)	--	61,618	--	65,054
Braided narrow fabrics	(X)	--	143,060	--	164,996
Elastic braids	Linear yards	945.4	36,029	956.7	40,777
Nonelastic braids	(X)	--	107,031	--	124,219
Shoe & corset laces	Pounds	9.3	41,050	9.7	41,342
Other nonelastic braids	(X)	--	65,981	--	82,877
Narrow fabrics, type not specified	(X)	--	39,237	--	40,623

(X) = not applicable

Note: The above represents the quantity and value of products made from own materials and excludes production made from materials owned by others.

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA22G.

PRODUCTION OF TEXTILES

Knit Fabrics

Conditions in the domestic knit fabrics industry have lost the rosy hue that predominated when knits were at the peak of their popularity in the 1960's. Changing consumer tastes, competition from imports and changes in the timing of large retail buyers are noted by industry spokesmen among their current problems.

The latest information currently available in the Census Bureau's CIR series covers knit fabric production in the year 1981. However, Federal Reserve Board production indexes are available currently on knit goods which includes fabrics as well as knitwear made in knitting mills.

On a seasonally adjusted basis, the index for August 1983 was up 5.3% over the index in August 1982, although it registered an 8% drop compared with the July 1983 index. Results this year are expected to be much better than in 1982 due to improvements in the economy and the strength of the demand for active wear in which knits are an important component.

Knitters have been aggressively developing new fashion fabrications to appeal to the young, active market.

Summary of Knit Fabric Production
(Millions of Pounds)

	1981	1980	1979
Knit fabric production	1,420	1,597	1,754
Warp knit fabric	360	407	473
Tricot, simplex & milanese	295	343	408
Raschel & raschel-crochet	65	64	66
Weft knit fabric	1,060	1,190	1,281
Single circular knit	654	688	710
Double knit & interlock	298	381	458
Rib knit	108	121	113

Production of Knit Fabrics by End-Use, 1980, 1981
(Millions of Pounds)

	1981	1980
Warp knit yardgoods	360.1	407.0
Tricot, simplex & milanese	295.1	343.2
Underwear, nightwear, loungewear, lingerie, foundations	143.5	192.9
Outerwear fabric	71.2	73.6
All other tricot fabrics	64.7	61.2
End-use not specified	15.7	15.6
Raschel & raschel-crochet	65.0	63.8

(continued)

PRODUCTION OF TEXTILES & APPAREL

Knit Fabrics

Production of Knit Fabrics by End-Use, 1980, 1981
(Millions of Pounds)
(continued)

	1981	1980
Weft knit yardgoods	1,060.4	1,189.9
Single circular knit	654.1	688.0
Excluding high pile, terry cloth, etc.	428.3	463.6
Underwear & nightwear	176.3	196.4
Shirts, tops, blouses, dresses	172.7	178.5
All other uses	53.6	72.3
High pile (silver knit & spring needle)	143.5	130.1
Velour & terry cloth	48.3	71.3
End-use not specified	34.0	23.0
Double knit & interlock	298.4	380.8
Outerwear apparel other than shirts	187.6	254.0
Shirts, blouses & tops	79.3	90.3
All other uses	14.0	19.7
End-use not specified	17.5	16.8
Rib, other than double knit & interlock	107.9	121.1

Distribution of Knit Fabrics Off Knitting Machines, 1980, 1981

	1981	1980
Total	100.0%	100.0%
Produced for sale	56.5	56.0
Produced for own use	33.7	33.3
Produced on commission	9.8	10.7

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA-22K.

Nonwoven Fabrics

One of the bright spots in the textile/apparel industrial complex over the past several years has been the nonwoven fabric area. Frost & Sullivan, a Cleveland based market research company, reports that between 1978 and 1981 sales of nonwovens rose from $1.05 billion to $1.08 billion, but estimates that by 1986 sales could more than double, reaching $2.24 billion (*Daily News Record*, November 16, 1982).

As opposed to most other areas of the textile/apparel industry, analysts see a bright future for nonwovens. Most analysts agree that presently, the over-capacity status coupled with reduced inventories of most nonwoven markets will help to unleash a substantial increase in production to replenish these inventories.

PRODUCTION OF TEXTILES & APPAREL

Nonwoven Fabrics

Major growth in nonwovens is expected to be the medical-surgical, geotextile and industrial specialty areas. Areas expected to be of declining importance are interlinings and automotive applications due to the severe impact the 1981-82 recession has had on these areas. The disposable diaper and sanitary napkin markets are now labeled as mature by most industry analysts; however, in terms of sheer volume, these uses are and will continue to be the largest markets for disposable nonwovens. It is currently estimated that disposable nonwovens account for slightly more than half of domestic nonwoven consumption, versus durable nonwovens.

In terms of volume, the market for nonwoven fabrics is expected to increase from the 3.88 billion square yards recorded in 1981 to 5.69 billion in 1986, an increase of 46.6% for the period. The industry consumed 769 pounds of fibers and polymers in 1981 valued at $392 million, and is expected to increase this consumption to 1.15 billion pounds, worth $743 million in 1986.

VALUE OF PRODUCT SHIPMENTS

A preliminary estimate on the value of specified products of the textile/apparel complex for the year 1982 (which are subject to revision), as well as the relationship to shipments of the value of exports and of imports, have been reported by the U.S. Bureau of Industrial Economics in the 1983 U.S. Industrial Outlook.

Estimated Value of Shipments, Imports, Exports, 1982

	Cellulosic Fibers	Non-Cellulosic Fibers	Yarns (incl. wool)	Broad Woven Fabrics	Knit Fabrics	Apparel*
Value (mil. $)						
Product shipments	$ 913	$ 7,160	$ 4,135	$ 13,725	$ 4,783	$38,000
Exports	67	1,302	87	685	51	778
Imports	24	90	137	1,344	20	7,536
Exports as a % of shipments	7.3	18.2	2.1	5.0	1.1	2.0
Imports as a % of apparent consumption (value)**	2.8	1.5	3.3	9.3	0.4	16.6

* Estimated data for apparel, alone, not including other textile products.
**Apparent consumption is the sum of product shipments plus imports less exports.

In terms of a constant (1972) dollar value, the compound annual rate of growth within the textile/apparel industry of product shipments has been reported by the Bureau of Industrial Economics as follows for 1972-1982:

(continued)

VALUE OF PRODUCT SHIPMENTS

	Compound Annual Rate of Growth (Loss) 1972-1982
Cellulosic fibers	- 4.2%
Non-cellulosic fibers	+ 4.4
Textile mill products	- 1.1
Yarns, except wool	- 2.0
Wool yarns	- 1.9
Cotton broad woven fabrics	- 3.6
Man-made fiber fabrics	+ 1.8
Wool fabrics	- 0.7
Knit fabrics	-0-
Apparel & other textile products	- 0.8

Source: U.S. Bureau of Industrial Economics, 1983 U.S. Industrial Outlook.

In years between the complete census of manufactures conducted every five years by the U.S. Bureau of the Census, the Bureau compiles annual surveys of manufactures. Data from the most recent report covering 1981 shipments, compared with 1980, are reported in the following table.

Value of Shipments by Product Classes, 1980, 1981
(Including Shipments by All Producers)
(Millions of Dollars)

Textile & Apparel Products	1981	1980	% Change 1981/1980
Fibers			
Rayon & acetate fiber	$1,230.9	$1,155.9	+ 6.5%
Noncellulosic organic fibers	8,139.2	7,146.7	+ 13.9
Nylon fibers, exc. producer textured	2,788.2	2,494.4	+ 11.8
Acrylic & modacrylic fibers, exc. textured	648.8	627.3	+ 3.4
Polyester fibers, exc. producer textured	3,231.9	2,715.8	+ 19.0
Other noncellulosic man-made fibers, exc. textured	517.3	416.6	+ 24.2
Producer textured man-made fibers, group filament	944.3	885.2	+ 6.7
Organic fibers, noncellulosic, not specified by kind	8.7	7.4	+ 17.6
Glass fibers (textile)	798.9	681.0	+ 17.3
Textile mill products			
Cotton broad woven fabrics*	4,778.4	4,876.2	- 2.0
Man-made fiber & silk broad woven fabrics*	8,533.2	7,554.7	+ 13.0
Woven wool fabrics	885.5	730.7	+ 21.2
Narrow fabrics	955.5	859.3	+ 11.2
Fabric finishing (other than in weaving mill)			
Cotton broad woven fabrics	1,207.6	1,233.0	- 2.1
Man-made fiber & silk broad woven fabrics	2,560.2	2,111.3	+ 21.3
Finished yarn, raw stock & narrow fabrics except knit & wool (not spun, thrown, woven or braided in the same establishment)	752.7	721.7	+ 4.3

(continued)

VALUE OF PRODUCT SHIPMENTS

Value of Shipments by Product Classes, 1980, 1981
(Including Shipments by All Producers)
(Millions of Dollars)
(continued)

	1981	1980	% Change 1981/1980
Knitting mill products			
Women's hosiery, except socks	$1,132.5	$1,105.9	+ 2.4%
Hosiery, not elsewhere classified	1,300.0	1,189.5	+ 9.3
Knit outerwear	2,600.2	2,442.8	+ 6.4
Knit underwear & nightwear	700.3	731.1	- 4.2
Circular knit fabric	2,979.0	3,137.2	- 5.0
Warp knit fabric	1,706.9	1,739.1	- 1.9
Knit gloves & knit products, not elsewhere classified (made from yarns or fabrics knit in the same establishment)	113.0	142.0	- 20.4
Woven carpets & rugs	211.8	202.4	+ 4.6
Tufted carpets & rugs	5,409.0	5,277.6	+ 2.5
Carpets & rugs, type not specified	140.9	126.9	+ 11.0
Yarn, except wool	4,894.0	4,592.8	+ 6.6
Textured, thrown & rewound yarn	2,020.3	1,818.5	+ 11.1
Wool yarn	358.4	303.9	+ 17.9
Thread	743.7	666.7	+ 11.5
Pressed, punched or needled felts, except hats	245.3	224.0	+ 9.5
Lace & net goods	68.6	54.7	+ 25.4
Paddings & upholstery filling	270.3	256.6	+ 5.3
Processed textile waste	234.1	212.4	+ 10.2
Coated fabrics, not rubberized	1,153.3	1,019.3	+ 13.2
Tire cord & tire fabrics	903.1	866.1	+ 4.3
Non-woven fabrics & products	1,761.3	1,529.6	+ 15.1
Cordage & twine	378.4	339.7	+ 11.4
Other textile goods	323.2	299.9	+ 7.8
Rubber coated fabrics & rubber clothing	280.2	226.4	+ 23.8
Apparel, total (not incl. products made in knitting mills)	36,123.8	33,145.5	+ 9.0
Men's & boys' wear (specified types)	14,691.2	13,953.9	+ 5.3
Suits, coats, other tailored clothing	2,842.8	2,701.4	+ 5.2
Shirts (except work) & nightwear	3,457.6	3,340.1	+ 3.5
Underwear (made from purchased fabrics)	363.8	397.7	- 8.5
Neckwear	299.6	280.0	+ 7.0
Separate trousers	1,990.5	1,838.2	+ 8.3
Work clothing, work shirts, etc.	4,345.9	4,086.8	+ 6.3
Other men's & boys' wear (heavy outerwear, non-tailored jackets, etc.	1,391.0	1,309.7	+ 6.2
Women's & children's wear (specified types)	21,432.6	19,191.6	+ 11.7
Blouses, shirts, women's & misses'	3,652.2	3,331.2	+ 9.6
Dresses, women's & misses'	4,357.5	4,277.9	+ 1.9
Suits & coats, women's & misses'	3,513.6	2,988.3	+ 17.6

(continued)

VALUE OF PRODUCT SHIPMENTS

Value of Shipments by Product Classes, 1980, 1981
(Including Shipments by All Producers)
(Millions of Dollars)
(continued)

	1981	1980	% Change 1981/1980
Apparel (continued)			
Other outerwear, women's & misses'	$4,515.1	$3,781.1	+ 21.4%
Underwear & nightwear (made from purchased fabrics)	2,294.7	2,141.7	+ 7.1
Brassieres & allied garments	683.7	605.0	+ 13.0
Children's dresses & blouses	1,227.8	1,038.1	+ 18.3
Children's coats & suits	206.0	213.5	- 3.5
Children's outerwear, not elsewhere classified	981.7	877.8	+ 11.8
Men's, women's, children's wear			
Hats & caps, except millinery	555.0	543.3	+ 2.2
Fur goods	497.4	539.8	- 7.9
Gloves, fabric, dress & work	278.2	284.1	- 2.1
Robes & loungewear, except children's	374.3	357.3	+ 4.8
Raincoats & other waterproof outergarments	453.7	447.4	+ 1.4
Leather & sheep-lined clothing	248.2	246.6	+ 0.6
Apparel belts	446.4	358.4	+ 24.6
Apparel & accessories, not elsewhere classified	306.4	265.0	+ 15.6
Other textile products (exc. products made in knitting or weaving mills)	9,517.9	8,585.2	+ 10.9
Household textiles			
Curtains & draperies, except lace	1,033.6	1,014.6	+ 1.9
Linens & domestics (sheets, towels, etc.)	3,031.6	2,816.3	+ 7.6
Textile bags, except laundry, wardrobe & shoe	371.3	301.7	+ 23.1
Canvas & related products	713.6	562.1	+ 27.0
Pleating & stitching, embroidery (except schiffli)	689.3	650.0	+ 6.0
Trimmings, automotive & apparel	2,254.4	1,943.9	+ 16.0
Schiffli machine embroideries	244.0	209.6	+ 16.4
Other fabricated textile products	1,180.1	1,087.0	+ 8.6

(r) = revised
nr = not reported
n.e.c. = not elsewhere classified
* Includes fabricated textile products, such as sheets and towels, made in weaving mills, as well as gray goods and finished broad woven fabrics.

Source: U.S. Bureau of the Census, 1980, 1981
Annual Survey of Manufactures.

VALUE OF PRODUCT SHIPMENTS

Based on a survey of manufacturers in the industry, the U.S. Bureau of the Census has issued data on the value of shipments of apparel items for the year 1982 compared with 1981 in the Current Industrial Reports series (1981 totals may differ from those issued in the Annual Survey of Manufactures and are subject to revision).

Value of Shipments of Major Categories of Apparel, 1981, 1982

(Millions of Dollars)

	1982	1981	% Change 1982/1981
Total apparel, not including accessories, hosiery, furs or products made in knitting mills	$32,311.5	na	--
Men's wear, total	11,762.6	na	--
Tailored clothing & casual wear	2,264.0	$ 2,326.4	- 4.2%
Shirts, tops, sweaters	2,794.1	2,851.4	- 2.0
Trousers, slacks, jeans, shorts	3,314.2	3,357.8	- 1.3
Outerwear jackets	619.3	513.9	+ 20.5
Work wear	914.0	939.3	- 2.7
Athletic wear, incl. boys'	875.2	na	--
Nightwear, underwear	999.7	956.5	+ 4.5
Boys' wear	1,736.3	1,844.2	- 5.9
Tailored clothing & casual wear	135.0	135.5	- 0.4
Shirts, tops, sweaters	593.2	624.6	- 5.0
Trousers, slacks, jeans, shorts	754.1	805.8	- 6.4
Outerwear jackets	92.0	107.7	- 14.6
Work wear	29.4	34.8	- 15.5
Nightwear, underwear	132.6	135.8	- 2.4
Women's, misses' & junior wear	16,056.5	na	--
Dresses, coats, suits, sportswear, etc.	12,530.0	11,932.8	+ 5.0
Active sportswear, playwear	706.4	na	--
Innerwear, nightwear, foundations	2,583.7	2,480.7	+ 4.2
Washable service apparel	236.4	220.5	+ 7.2
Girls', children's, infants' wear	2,756.1	2,667.0	+ 3.3
Dresses, coats, suits, skirts, blouses, sweaters	1,814.4	1,747.7	+ 3.8
Playwear, swimwear	484.5	456.2	+ 6.2
Underwear, nightwear	457.2	463.1	- 1.3

Source: U.S. Bureau of the Census, Current Industrial Reports, Apparel, MA-23A.

PRODUCER PRICE LEVELS

Producer (factory) price increases for textile products and apparel averaged slightly less than those for all industrial commodities in 1982 according to data released by the U.S. Bureau of Labor Statistics. Overall textile products and apparel prices at the factory were 2.5% higher in 1982 than in 1981 while the price increase for all industrial commodities during this same period was 2.7%.

In June of 1983, the price of textile products and apparel had declined, overall by 0.2% while the price of all industrial products registered an increase of 1.2% compared with June of 1982.

There are several possible reasons for the producer prices of textiles and apparel to rise at a slower rate than that of all industrial commodities including the competitive nature of the industry and competition from foreign supply sources. Because the impact of inflation on textiles and apparel has been less severe than on other commodities, it is expected that the deflationary pressures that are expected in the short term will also be less severe.

Producer Price Index, 1981, 1982 & June 1982, 1983
(1967 = 100, unless otherwise noted)

	June Average			Annual Average		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
Industrial commodities	314.4	310.6	+ 1.2%	312.3	304.1	+ 2.7%
Textile products & apparel	204.5	205.0	- 0.2	204.6	199.7	+ 2.5
Selected textile mill products*	137.2	138.2	- 0.7	138.2	135.9	+ 1.7
Synthetic fibers*	156.6	162.8	- 3.8	162.1	156.3	+ 3.7
Processed yarns & threads*	137.6	139.4	- 1.3	138.3	138.0	+ 0.2
Gray goods*	145.8	146.0	- 0.1	145.3	146.8	- 1.0
Finished fabrics*	122.5	124.0	- 1.2	124.6	125.2	- 0.5
Apparel products	196.6	195.0	- 0.8	194.4	186.1	+ 4.5
Women's wear	175.0	173.5	+ 0.9	173.1	164.5	+ 5.2
Men's wear	222.7	220.5	- 1.0	219.5	210.9	+ 4.1
Infants' & children's wear	197.5	195.3	+ 1.1	196.6	190.8	+ 3.0
Textile housefurnishings	239.5	239.7	+ 0.1	238.5	226.7	+ 5.2
Bedclothes*	134.1	138.5	- 3.2	137.0	129.8	+ 5.5
Bath products*	143.9	142.5	+ 1.0	144.2	143.1	+ 0.8
Window & furniture accessories*	136.7	129.6	+ 5.5	128.9	119.3	+ 8.0
Final textile products, n.e.c.*	134.5	134.4	+ 0.1	134.9	131.7	+ 2.4
Carpets & rugs	157.5	160.2	- 1.7	159.1	157.2	+ 1.2

* = 12/75 = 100

n.e.c. = not elsewhere classified

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

The 20-year old coalition of U.S. fiber, textile and apparel producers is becoming strained by the rising tide of imports and divergent competitive pressures. With the release of September 1983 data on textile and apparel imports, the nation appeared to be headed for a staggering $9.5 billion deficit in textile and apparel trade this year--31% higher than last year's record total, according to the American Textile Manufacturers Institute.

This is based on annualized rates of import/export growth registered in the first nine months of 1983. The total value of textile/apparel imports in the period rose 13% over the same 1982 period; in quantity (square yard equivalents), the nine-month total gained 20.8%.

Contrary to the pattern in past years, in recent months the textile mill segment has been particularly hard hit by imports. In the first nine months of 1983 the quantity of textile mill products imported into the U.S. climbed 31.6% over the same 1982 period. Apparel imports were up at a smaller rate--13%. The American Apparel Manufacturers Association reports that on an annualized basis overall apparel imports are running at a rate of 3.93 billion square yards--550 million SYE more than in 1982. The Association anticipates that 1983 volume of imports will exceed any expansion for 1983 in the domestic market.

Exports of textile/apparel, on the other hand, declined 17% in value in the January-September period compared with the same months of 1982. Despite the efforts of the textile industry to become more competitive in foreign markets, exports have been hurt by a strong dollar as well as by excessive duty rates, strict overseas licensing laws and other non-tarrif barriers, such as subsidies by foreign governments.

The current jump in imports of textiles/apparel is attributed by U.S. Department of Commerce officials to a shaft in buying, with a heavier concentration in uncontrolled items, in textile mill products and in purchases from nations--notably the European Economic Community--where no bilateral agreement exist to curb the flow. The demand by the U.S. producers for a stronger import program and a revamping of controls that are ineffective is becoming stronger. Through loopholes in the trade treaties between the U.S. and the major apparel and textile exports--Taiwan, Korea, Hong Kong, Japan and China--imports are increasing despite the quotas.

Domestic apparel manufacturers have a hard time competing with imports, primarily because they have to pay their workers an average of $4.96 per hour; in Taiwan, the largest apparel exporter to the U.S., hourly wages are $1.32.

In order to compete and lower costs, many larger apparel firms have established off-shore processing or assembly facilities (particularly in the Caribbean basin) under duty provision Item 807. This allows U.S. firms to ship components to foreign operations that assemble the final product and ship it back to the U.S., with duty levied only on the value added abroad, rather than on the total value. In 1983 some major U.S. mills, including Dan River and West Point Pepperell decided to launch offshore apparel production under Item 807 with the announced intention of confining 807 merchandise to American apparel manufacturers, not to retailers. Textile mills have also sought acceptance of Item 809 which would result in lower duties on foreign apparel shipped to the U.S. which is made with U.S. textiles. Thus far this plan has been blocked.

FOREIGN TRADE

In another move, many U.S. apparel manufacturers are transferring their operations overseas, manufacturing garments abroad. This may be responsible for as much as 30% of the current import deluge, according to trade sources. A recent analysis indicated that 32% of all garments sold in the U.S. in 1982 were imported, and this figure will undoubtedly be larger by the end of 1983. (Daily News Record, September 8, 1983).

Apparel firms' problems have been enhanced by the increasing tendency of large American retailers to purchase directly from foreign suppliers. Imports provide retailers with higher margins than domestic apparel and can more easily be offered at sale prices--a major factor in current retail strategy. Retailers are, therefore, generally opposed to a strengthening of import controls.

Import penetration in the U.S. textile/apparel industries varies widely by product. Since cheap labor is the major cost advantage of foreign suppliers, and lead times of six months or more their principal disadvantage from a competitive standpoint, imports have tended to make their greatest penetration in the apparel lines that involve considerable labor but that are less fashion-sensitive. A study a couple of years ago estimated overall import penetration at 12%. It is certainly higher now, and, as noted, imports represented 32% of apparel sold in the U.S. Penetration by product category varies considerably within the complex. Very little carpeting, tire cord, or domestic products (sheets and towels) are imported.

Summary of Value of U.S. Imports & Exports of Textiles
(Excluding Fibers & Clothing, Including Yarn & Fabrics)
(Millions of Dollars)

Year	General Imports (Customs Value Basis*)	Exports (f.a.s. Basis)**	Exports Minus Imports
1975	$ 1,223.5	$ 1,624.5	$ 401.0
1978	2,231.9	2,225.4	- 6.5
1979	2,237.7	3,189.4	951.7
1980	2,504.1	3,632.0	1,127.9
1981	3,045.9	3,618.9	573.0
1982	2,807.5	2,784.1	-23.8

Summary of U.S. Imports & Exports of Apparel

1975	$ 2,550.8	$ 402.6	$-2,148.2
1978	5,617.9	677.0***	-4,940.9
1979	5,812.9	931.2	-4,881.7
1980	6,376.3	1,202.5	-5,173.8
1981	7,536.8	1,232.1	-6,304.7
1982	8,164.6	952.3	-7,212.3

(footnotes continued)

(Footnotes continued)

*The "customs value" generally represents the value in the foreign country and excludes freight, insurance and U.S. import duties.

**The f.a.s. value represents the transaction value of the port of export. It includes all charges incurred in placing the goods alongside the ship (carrier).

***About 45% of U.S. apparel exports in 1978 were reimported under Item 807 of the U.S. Tariff Schedule. This allows domestic manufacturers to send components "offshore" to be assembled by low-wage workers, then to have the product returned and duty paid only on the value added abroad. This is a growing development.

Source: U.S. Department of Commerce, Highlights of U.S. Export & Import Trade, (December issues).

A strong dollar and world-wide depressed markets caused a decline in exports of noncellulosic fibers in 1982 for the first time since 1975.

	Value (Millions of Dollars)	
	Imports	Exports
Cellulosic man-made fibers		
1980	$23.3	$81.6
1981	28.5	72.5
1982(p)	24.0	66.6
Organic fibers, noncellulosic		
1980	69.5	1,236.5
1981	99.0	1,518.0
1982(p)	90.3	1,302.0

(p) preliminary

Source: U.S. Department of Commerce,
Bureau of Industrial Economics,
1983 U.S. Industrial Outlook.

Imports

Quantity of U.S. Cotton, Wool & Man-made Fiber/Textile/Apparel Imports
(Millions of Pounds)

Product Group	Fiber	1982	1981	1980	% Change 1982/1981
Total imports		1,665.6	1,690.3	1,433.9	- 1.5%
	Cotton	896.8	961.9	810.9	- 6.8
	Wool	100.7	93.1	85.1	+ 8.2
	Man-made	695.1	635.3	537.9	+ 9.4

(continued)

FOREIGN TRADE

Imports

Quantity of U.S. Cotton, Wool & Man-made Fiber/Textile/Apparel Imports
(Millions of Pounds)
(continued)

Product Group	Fiber	1982	1981	1980	% Change 1982/1981
Yarn & thread, total		71.7	60.2	50.8	+ 19.1
	Cotton	28.5	24.1	19.2	+ 18.3
	Wool	7.8	5.0	4.2	+ 56.0
	Man-made	35.4	31.1	27.4	+ 13.8
Fabric, total		388.7	475.9	352.9	- 18.3
	Cotton	266.4	350.3	258.4	- 24.0
	Wool	25.7	27.8	21.2	- 7.6
	Man-made	96.6	97.8	73.3	- 1.2
Apparel, total		1,043.1	987.0	884.2	+ 5.7
	Cotton	510.2	504.0	463.8	+ 1.2
	Wool	46.4	45.9	41.7	+ 1.1
	Man-made	468.5	437.1	378.7	+ 7.2
Made-up & miscellaneous, total		182.1	179.6	145.9	+ 1.4
	Cotton	91.7	83.6	69.3	+ 9.7
	Wool	20.8	19.4	18.1	+ 7.2
	Man-made	69.6	76.6	58.5	- 9.1

Source: American Textile Manufacturers Institute, Inc., based on U.S. Department of Commerce reports.

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Expenditures for New Plant & Equipment

According to the Bureau of Economic Analysis, U.S. Department of Commerce, in 1982 textile mills spent $1.33 billion for new plant and equipment--representing a decline of 14.6% from the $1.56 billion spent in 1981. Expressed in 1972 dollars to adjust for inflation, the 1982 spending total was the lowest in almost 20 years.

A quarterly survey of the textile industry is conducted by the Bureau to develop information on current spending for new plant and equipment and plans. According to the most recent survey taken in July and August 1983, textile corporations said they plan to increase spending and if plans hold up, the year 1982 would mark the first increase reported by the Bureau since 1980. In that year the textile industry's spending rose to $1.62 billion, gaining 8% over 1979. Inflation eroded most of the gain, but that will not be the case this year as the Commerce Department estimates capital goods' prices will decline 0.8% in 1983.

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Expenditures for New Plant & Equipment

With improved economic conditions, as retained cash flow rises, textile mills will implement delayed improvements. Normally, 80% of the industry's retained cash flow is invested; however, because of the stiff competition from foreign producers, industry analysts believe a higher level of investment will be needed if the industry is to remain competitive.

Federal regulatory standards on dust control and on allowable noise levels in the textile mills are still of concern to mills and machinery manufacturers, as the cost of installing and maintaining more pollution control equipment is seen as a dampener on purchases of other mill machinery and equipment. The high cost of borrowing is another factor in holding down improvements, particularly among the smaller producers.

The apparel industry is also expected to make significant increases in capital expenditures to upgrade equipment in 1983. There is still much overcapacity due to cutbacks in apparel demand, but some equipment is lying idle because it is antiquated.

Apparel manufacturers are now increasingly looking to computerized equipments both for material handling and management control. Such improvements are looked to in order to reduce the cycle time from cutting to finished products, and thus reduce costs. Knit goods manufacturers are installing electronic knitting machines to an increasing extent.

Due to a difference in compiling data and to industry definitions, information on spending for new plant and equipment by the Bureau of Economic Analysis and by the Bureau of the Census differ. The former, however, develops the current trends, while the most recent information from the Census Bureau is from the Annual Survey of Manufactures, 1981. Details from the Annual Survey follow:

Textile Mill & Apparel Industry Expenditures, Retirements, Depreciation, 1981
(Millions of Dollars)

	Textile Mill Products			Apparel & Other Textile Products		
	Total	Buildings, Other Structures	Machinery & Equip.	Total	Buildings, Other Structures	Machinery & Equip.
Assets, beginning of year	$16,567.8	3,970.9	12,596.8	$4,811.7	1,666.0	3,145.7
Capital expend., new	1,724.8	286.2	1,438.6	646.0	163.4	482.6
Capital expend., used	136.9	27.4	109.5	57.3	24.0	33.3
Retirements	931.1	183.0	748.1	516.1	126.1	390.1
Assets, end of year	17,498.3	4,101.5	13,396.0	5,000.2	1,727.2	3,272.0
Depreciation charges	1,121.4	161.3	960.0	654.1	157.6	496.5
Rental payments	193.1	100.8	92.3	369.9	240.9	129.0

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Expenditures for New Capital Expenditures by Type of Textile Mill & Apparel Plant, 1980, 1981
(In Millions of Dollars)

	1981	1980	% Change 1981/1980
Textile mill products industry, total	$1,724.8	$1,488.3	+ 15.9%
Weaving mills:	742.1	645.2	+ 15.0
Cotton	289.3	217.5	+ 33.0
Man-made fiber, silk	408.7	372.2	+ 9.8
Wool, weaving & finishing mills	18.2	22.5	- 19.1
Narrow fabric mills	25.9	22.0	+ 17.7
Knitting mills, total	298.0	293.6	+ 1.5
Hosiery	22.6	27.8	- 18.7
Knit outerwear mills	50.0	48.5	+ 3.1
Knit underwear mills	17.2	21.4	- 19.6
Knit fabric mills (circular & warp knit)	106.5	129.3	- 17.6
Knitting mills, not elsewhere classified	1.6	2.6	- 38.5
Textile finishing, except wool	101.8	108.2	- 5.9
Floor covering mills	119.2	109.6	+ 8.8
Yarn & thread mills	291.0	231.5	+ 25.7
Miscellaneous textile goods	172.7	111.2	+ 55.3
Apparel & other textile products, total	646.0	607.8	+ 6.3
Men's & boys' suits & coats	35.9	29.8	+ 20.5
Men's & boys' furnishings	145.9	180.4	- 19.1
Women's & misses' outerwear	220.3	166.2	+ 32.6
Women's & children's innerwear	33.7	35.5	- 5.1
Children's outerwear	16.6	21.0	- 21.0
Hats, caps & millinery	19.8	21.8	- 9.2
Fur goods	0.3	na	--
Miscellaneous apparel & accessories	23.8	20.1	+ 18.4
Miscellaneous fabricated textile products	149.7	132.1	+ 13.3

Source: U.S. Bureau of the Census,
1980, 1981 Annual Survey of Manufactures,
M81(AS)-1.

Textile Machinery in U.S. Mills

Cotton System Spindles

	May		Annual Average	
	1983	1982	1982	1981
Spindles in place (thous.)	15,855	16,945	16,086	16,744
Spindles active (thous.)	14,099	15,271	14,179	15,435
Hours operated per active spindle (thous.)*	520	428	5,487	5,885
% of spindles active on:				
100% cotton	37.3	36.6	36.7	36.4
100% man-made fiber	13.2	13.6	13.7	14.0
Other fibers & blends	49.5	49.8	49.6	49.5
Total spindle hours operated (millions)	7,331	6,541	81,455	91,857

*End of period

Source: American Textile Manufacturers Institute, Inc.

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Textile Machinery in U.S. Mills

Knitting Machines Producing Knit Fabrics

	Number Operating on Last Working Day of Year	
	1981	1980
Total knit fabric machinery	31,619	34,485
Warp knit yard goods, total	6,322	7,159
Tricot, simplex & milanese	4,085	4,579
Raschel, raschel-crochet	2,237	2,580
Weft knit yard goods, total	25,297	27,326
Single circular knit, excluding high pile	13,863	13,776
Single circular knit high pile:		
Silver knit & spring needle	3,352	3,058
Velour & terry cloth	922	1,133
Double knit & interlock	6,539	8,368
Rib, other than double knit & interlock	4,895	5,182

Broad Woven Fabric Machinery

	Number in Place			
	At End of 1st Qtr.		At End of Year	
	1983	1982	1982	1981
Looms, total	217,646	244,797	213,454	250,966
Single shuttle cam looms	121,032	135,194	120,193	140,636
Single shuttle dobby looms	29,471	43,697	29,980	44,242
Multiple shuttlebox or head motion looms	12,374	12,314	11,044	13,419
Double shuttle pile & plush jacquard looms	6,990	7,582	6,848	7,847
Shuttleless looms & weaving machines	47,779	45,290	45,389	44,822
Single filling insertion capability	33,997	34,077	32,494	34,261
Multiple filling insertion capability	13,782	11,213	12,895	10,561

By Mill Type

	First Quarter		At End of Year	
	1983	1982	1982	1981
Broad woven fabrics:	188,175	244,013	188,485	233,821
Cotton fabrics	60,513	66,100	62,086	70,019
Man-made fabrics	125,723	155,588	124,536	161,726
Wool fabrics	1,939	2,325	1,863	2,076
Tire cord & tire fabrics	1,047	1,154	1,029	1,183

(continued)

CAPITAL EXPENDITURES, TEXTILE & APPAREL MACHINERY & EQUIPMENT

Textile Machinery in U.S. Mills

By Mill Type
(continued)

	Number at Year End	
	1982	1981
Narrow fabrics: (In Place)		
Tape looms	4,344	4,430
Up to 36 weaving spaces	2,912	2,920
37 to 49 weaving spaces	527	519
50 to 99 weaving spaces	848	947
100 weaving spaces & over	57	44
Webbing looms	1,260	1,383
Up to 12 weaving spaces	999	1,099
13 to 24 weaving spaces	118	155
25 to 36 weaving spaces	51	32
37 weaving spaces & over	92	97
Multiple or gang shuttle elastic looms	359	470
36 spaces & under	171	181
38 to 58 spaces	107	154
60 spaces & over	81	135
Shuttleless elastic looms	3,082	3,355
Braiders	68,398	68,563
13 carriers & under	15,004	15,688
14 to 33 carriers	38,931	37,987
34 carriers & over	14,463	14,888

Source: U.S. Bureau of the Census, Current Industrial Reports, MQ-22T, MA-22G

TEXTILE MACHINERY INDUSTRY

The Textile Machinery Industry (SIC 3552)*

	1982(e)	1981	1980	% Change 1982/1981	% Change 1981/1980
Number of establishments**	na	na	574	--	--
Employees, total (thous.)	19.9	22.9	24.3	- 13.1%	- 5.8%
Production workers, (thous.)	13.2	15.7	16.8	- 15.9	- 6.5
Value added by manufacture (mil. $)#	$ 695.0	$ 776.7	$ 715.3	- 10.5	+ 8.6
Value of industry shipments (mil. $)##	1,140.0	1,245.0	1,170.5	- 8.4	+ 6.4
Exports as a % of product shipments	27.9%	31.5%	34.9%	--	--
Imports as a % of apparent consumption	42.6	44.2	46.9	--	--

(e) = estimated by U.S. Bureau of Industrial Economics (1983 U.S. Industrial Outlook).
na = not available
*SIC (Standard Industrial Classification) Industry 3552 covers establishments primarily engaged in manufacturing machinery for the textile industries, including parts, attachments and accessories. It does not include manufacturers of domestic or industrial sewing machines (SIC 3636).
**Each business location is counted as a separate establishment

(footnotes continued)

Shipments

(Footnotes continued)

#Value added by manufacture is derived by subtracting the cost of materials, supplies, containers, fuel, purchased electricity and contract work from the value of shipments. The result of this calculation is then adjusted for value added by merchandising operations and for inventories. This measure avoids the duplication in the figure for value of shipments which results from the use of products of some establishments as materials by others, and it is considered the best value measure for comparing the relative economic importance of manufacturing among industries.

##Includes the net selling values of all products shipped, both primary and secondary, as well as miscellaneous receipts. The value of textile machinery shipped within this industry (SIC 3552), as well as secondary producers classified in other industires, is shown in the following table, covering value of product shipments.

Value of Shipments of Textile Machinery by All U.S. Producers, 1979, 1980, 1981
(Millions of Dollars)

	1981	1980	1979	% Change 1981/1980	% Change 1980/1979
Textile machinery, total	$1,144.5	$1,123.2	$1,057.3	+ 1.9%	+ 6.2%
Textile machinery, except parts & attachments	469.4	474.2	453.4	- 1.0	+ 4.6
Textile machinery parts & attachments	586.7	571.3	542.4	+ 2.7	+ 5.3
Textile machinery, not specified by kind	88.3	77.7	61.4	+ 13.6	+ 26.5

Source: U.S. Bureau of the Census,
1981 Annual Survey of Manufactures,
M81(AS)-2.

According to estimates by the U.S. Bureau of Industrial Economics, shipments of U.S. textile machinery in 1982 declined about 14% compared with 1981 after adjusting for inflation. Between 1972 and 1982, shipments declined at a compound annual rate of 4.9% as world economic conditions deteriorated. However, with a decline in interest rates and in the face of the competitive pressures the domestic textile and apparel industries are facing, a pickup is expected in 1983. World markets, too, are expected to improve, although U.S. manufacturers are not expected to regain technological parity with overseas manufacturers of high production weaving and winding equipment or high production ringless spinning, knitting and printing machinery. They are expected to remain competitive in yarn preparation equipment, including ring spinning and roving, as well as finishing and dyeing equipment.

Improved quality of yarn preparation will be necessary to take full advantage of high speed production equipment. This will open additional markets for machinery for opening cleaning, carding, drawing and warp preparation.

TEXTILE MACHINERY INDUSTRY

Shipments

Computer-controlled monitoring or production is being accepted in the industry. This makes it possible not only to control the quality of the end product, but to make major savings in energy consumption, a major consideration in the industry.

Foreign Trade

Imports of textile mill machinery continue to be a major concern to domestic producers. Between 1981 and 1982, the U.S. Department of Commerce reported that the volume of mill equipment imported fell 6.1% to $630,190,000 from $671,064,000. Despite this decline, imports reportedly accounted for 43% of all domestic purchases in 1982. Weaving equipment and parts were the most commonly imported piece of machinery in 1982, accounting for 38% of the total, while spinning equipment and parts represented 17% of the total. The largest exporters of textile equipment to the U.S. were West Germany and Switzerland accounting for 33% and 31% of U.S. imports respectively.

Exports of textile machinery fell to $272 million in 1982, off 18.7% from the previous year. The European Economic Community was the largest purchaser of the equipment, taking 20% of U.S. exports while Canada and Mexico took 13% each. Exports in 1982 are estimated to account for approximately 28% of total product shipments in that year.

A recent survey of the industry indicates that about 80% of the worlds textile mill equipment has been operating for more than 10 years with an estimated 50% in operation for more than 20. For this reason many analysts believe that many of the worlds textile mills will begin to modernize their operations within the next five years. A major obstacle to U.S. producers gaining a large share of the perceived world growth in the coming years is the perception that U.S. producers are less competitive with regard to price and technology in the weaving and ringless spinning areas. However, it is estimated that shipments of U.S. producers will grow at a real 2% annual rate through 1988.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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FACT FILE

Market Research Division
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Department Store Sales

FAIRCHILD FACT FILE

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E. B. Gold, Manager
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DEPARTMENT STORE SALES

INTRODUCTION

This report summarizes the number of stores operated and sales in 1982 (or nearest fiscal period) for traditional department store organizations (as well as a limited number of specialty stores), listed by buying headquarter location. Branch store locations are included only where sales estimates are available.

Stores are listed by state and city within the four major geographic regions: Northeast, Nort Central, South and West. Listings of stores, store groups or divisions with a volume of $50 million or more and of chain and conglomerate organizations are also included in this report.

The sales figures are reported by the stores or in many cases are estimates believed to be reasonably accurate. Sources include the editorial staffs of Women's Wear Daily and other Fairchild trade papers, Dun and Bradstreet and other trade sources.

The Standard Industrial Classification (SIC) Manual defines department stores as establishments normally employing 25 people or more, having sales of apparel and soft goods combined amounting to 20 percent or more of total sales, and selling each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radio and TV sets
2. A general line of apparel for the family
3. Household linens and dry goods

To qualify as a department store, sales of each of the above listed lines must be less than 80 percent of total sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceeds the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Relatively few stores are included in this classification as a result of this special rule and most of those which are would otherwise have been classified in the apparel group.

To an increasing extent, however, department stores are diversifying their activities, opening specialty store units, off-price outlets, etc., or becoming part of conglomerate operations active in a number of different types of businesses. This has, of course, added to the difficulty of isolating department store volume from consolidated sales data.

NOTE: This report includes only those stores for which sales data, believed to be reasonably accurate, are available. The sales estimates reported may differ markedly from estimates reported for previous years. This may be due, however, not to an actual gain or loss in volume of the magnitude indicated but to differences in the compilation of estimates. Since revisions in earlier estimates may be in order, year-to-year comparisons in sales figures are not recommended.

Fairchild Market Research Division
Audrey S. Balchen, Director

SUMMARY OF AVAILABLE SALES FIGURES FOR DEPARTMENT STORES, 1982*
BY REGION

	Approx. Sales (Millions of $)
NORTHEAST	
CONNECTICUT	
Bridgeport	
D. M. Read Inc. (Allied Stores, New York, N.Y.) (5 Conn. stores)	$ 70.0
Hartford	
G. Fox & Co. (May Dept. Stores, St. Louis, Mo.) (8 stores: Conn. 6, Mass. 1, R.I., 1)	152.6
Sage-Allen & Co. (13 Conn. stores)	58.1
Stamford	
Dress Barn (68 specialty stores)	33.5
(Saks Fifth Avenue, New York, branch opened March 1983 in Stamford Town Center Mall. Expected to reach a volume of $15 million by 3rd year)	
MAINE	
Brunswick	
W.F. Senter Co. (1 store)	2.8
Damariscotta	
R.H. Reny Inc. (12 stores)	7.0
Freeport	
L. L. Bean (Mail order business, plus one store with estimated sales of over $20 million)	125.0+
Portland	
Porteous Mitchell & Braun (4 stores plus Downeast Shops specialty store division)	27.0
Waterville	
Butler's Department Store (1 store)	2.5
MASSACHUSETTS	
Boston Area	
Filene's (Federated Department Stores, Cincinnati, Ohio) (14 Department stores: Me. 1, Mass. 10, N.H. 2, R.I. 1, 8 basement stores: Mass. 4, N.H. 1, N.Y. 3)	372.8
Boston area (14 stores)	250.0
(Flushing, N.Y. store opened May 1983; expected 1st year volume: $8-$10 million. 2 basement stores in Boston and department stores in Portsmouth, N.H. and Portland, Me. opened in 1983. Units in Waterford, Conn. and Albany, N.Y. to open in 1984.)	

(Boston Area continued)

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* A limited number of apparel specialty stores for which sales figures are available are included in this report. Reported sales are for the year 1982, or closest fiscal period, reflecting published figures or best available trade estimates.

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
MASSACHUSETTS	
Boston Area (continued)	
Harvard Coop., Cambridge (6 stores, including 5 on major campuses in Boston and Cambridge, 1 in downtown Boston)	$ 45.0+
Jordon Marsh (Allied Stores, New York, N.Y.) (14 stores: Mass. 11, Me. 1, N.H. 1, R.I. 1) (Hanover, Mass. store opened Sept. 1983; Crystal Mall, Waterford Conn. store to open July 1984)	410.0
Kennedy's (Phillips-Van Heusen Corp., New York, N.Y.) (8 stores in Mass. and R.I.)	41.7
Lechmere, Cambridge (Dayton-Hudson, Minneapolis, Minn.) (16 specialty stores)	188.0
The Talbot's, Hingham, Mass. (Catalog headquarters. Also operates 16 specialty stores)	80.0+
Pittsfield	
England Brothers Inc. (3 Mass. stores)	9.5
Springfield	
Albert Steiger Inc. (9 Mass. department stores)	50.0
Waltham	
Grover Cronin Inc. (1 store)	12.0
NEW JERSEY	
Bridgeton	
Rovner's Department Store (3 stores: N.J. 2, Del. 1)	5.2
Burlington	
Burlington Coat Factory (Burlington Coat Factory, New York, N.Y.) (31 stores) (5 units opened Sept. 1983; Ohio and Tex. stores in Oct. 1983)	130.5
Caldwell	
J. M. Towne & Co. (2 N.J. stores)	2.5
Lakewood	
Reynolds Bros. (4 N.J. stores)	6.0
Newark	
Bamberger's (R.H. Macy & Co., New York, N.Y.) 23 stores: N.J. 14, Pa. 5, N.Y. 1, Del. 1, Md. 2; also 3 Furniture Clearance Centers, 7 Auto Centers) (Paramus store was enlarged)	975.0
Hahne & Co. (Associated Dry Goods, New York, N.Y.) (8 N.J. stores)	105.0
Ocean City	
Stainton's Department Store	7.0

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
NEW JERSEY	
Paramus	
Stern's/Gertz (Allied Stores, New York, N.Y.) (16 stores in a consolidated operation as of August 1982)	$ 310.0
Paterson	
Meyer Brothers (2 N.J. stores)	4.0
Trenton	
United Department Stores (owns and buys for 5 Denby Stores, 5 S.P. Dunham, 5 Outlet Department Stores; 1 Sattlers, which was closed Jan. 1983)	50.0+
NEW YORK	
Binghamton	
Fowler's (S. Grumbacher & Sons, York, Pa.) (1 store, Johnson City, N.Y.)	3.0
Buffalo	
Adam, Meldrum & Anderson (10 N.Y. stores)	97.0
The Sample Inc. (12 N.Y. stores)	21.0
Cohoes	
Cohoes Specialty Stores (E.A. Sanford Co.) (2 stores: N.Y. 1, Conn. 1; 3rd to open in Fall 1983)	36.0
Elmira	
S.F. Iszard & Co. (2 N.Y. stores)	8.0
Rosenbaum's of Elmira, Inc. (3 N.Y. stores)	3.0
Glens Falls	
Economy Dry Goods, South Glens Falls, N.Y. (2 N.Y. stores: Joy Dept. Stores, Glens Falls and Rensselaer, N.Y.)	20.0
Pearl's Dept. Stores Inc. (20 specialty stores in N.Y.)	3.0+
Jamestown	
Jamestown-Bigelow Co. (1 department store) (Also operates 1 specialty store)	3.5
Kingston	
Britts Dept. Store Corp. (1 department store)	6.0
Liberty	
Sullivan's (2 specialty stores in N.Y.)	16.0+
New York City Area (Also see NEW JERSEY listings)	
Abraham & Straus, Brooklyn, N.Y. (Federated Dept. Stores, Cincinnati, Ohio) (14 stores: N.Y. 9, N.J. 4, Pa. 2)	650.5
Short Hills, N.J.	30.0
Monmouth, N.J.	30.0
White Plains, N.Y.	39.0

(New York City Area continued)

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
NORTHEAST	
NEW YORK	
New York City Area (continued)	
Alexander's (Alexander's Dept. Stores Inc., New York, N.Y.) (16 stores: Conn. 1, N.J. 3, N.Y. 12) Fiscal year ending July 30:	$ 511.4
B. Altman & Co. (The Altman Foundation, New York, N.Y.) (7 stores: N.Y. 3, N.J. 2, Pa. 2)	329.0
Fifth Avenue	157.0
White Plains	40.0
Paramus, N.J.	38.0
Manhasset, N.Y.	34.0
Willow Grove, Pa. (opened August 1982. Annual volume at the rate of $16 million as of Oct. 1983)	6.0
Short Hills, N.J.	29.0
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, Calif.) (1 specialty store) (Undergoing extensive renovation)	75.0
Bloomingdale's (Federated Dept. Stores, Cincinnati, Ohio) (12 full-line department stores: N.Y. 4, N.J. 2, Va. 1, Md. 1, Pa. 2, Conn. 1, Mass. 1)	680.5
59th Street	490.0
(A store in Valley View Center, Dallas, was opened in October 1983. Expected 1st year volume: $57 million)	
Bonwit Teller (Allied Stores, New York, N.Y.) (13 stores: Mass. 1, N.Y. 3, N.J. 1, Pa. 2, Ill. 2, Mich. 1, Fla. 2, Calif. 1)	110.0
Fifth Avenue, New York	21.0
Chicago, Ill. (2 stores)	21.0+
(A Palm Desert, Palm Springs, Calif., store was opened in Oct. 1983 which is expected to reach a volume of $10-$15 million in its first year)	
Brooks Bros. (Allied Stores, New York, N.Y.) (34 stores, incl. 5 in Japan)	180.0
Gimbels East (Batus Inc., New York, N.Y.) (Gimbels-New York and Gimbels-Philadelphia operations were combined in April 1, 1983, with a total of 20 units)	417.0
New York area: N.Y. 7, Conn. 1, N.J. 1)	277.0
Loehmann's Inc. (Acquired by Associated Dry Goods Corp. in 1983) (61 specialty stores in 25 states)	260.0
Lord & Taylor (Associated Dry Goods, New York, N.Y.) (38 stores: N.Y. 4, Conn. 2, Mass. 4, Md. 1, N.J. 2, Pa. 2, Va. 2, D.C. 1, Fla. 2, Ga. 1, Ill. 7, Mich. 3, Tex. 7. Also Clearance Center, Huntington, N.Y.)	558.0+
New York Area (9 stores)	190.0
Fifth Avenue	81.0
Available sales estimates for branch stores in other areas:	
North Central:	
Chicago area (7 stores)	103.0
Detroit area (4 stores)	39.0
South:	
Houston, Tex. area (3 stores)	39.0

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST

NEW YORK

New York City Area (continued)

	Approx. Sales (Millions of $)
Lord & Taylor (continued)	
(a 4th Houston store, at West Oaks, is to be opened Feb. 1984. Expected volume the 1st year: $10 million)	
Dallas, Tex. area (3 stores)	$ 31.7
Atlanta, Ga. (completely renovated in 1983)	12.5
Cutler Ridge, Miami, Fla.	10.0
(An Aventura Mall, Miami, store was opened in Jan. 1983. Expected 1st year volume: $10 million. A 4th Fla. store, at Fort Lauderdale Mall, was opened in Oct. 1983. Expected volume 1st year: $17 million. A store is also operated at Palm Beach Mall)	
Macy's New York (R.H. Macy, New York, N.Y.) (16 stores: N.Y. 14, Conn. 2, plus 4 Furniture Clearance Centers and 8 Auto Centers)	
Fiscal year ending July 1983:	1,043.0
Herald Square, New York	325.0
(An Aventura Mall, Miami, Fla. store was opened in Oct. 1983, which is expected to have a volume of over $50 million in its first full year. 2 Houston, Tex. stores are to be opened in 1984; 3 more in Texas in 1985)	
Mays (J.W. Mays Inc., Brooklyn, N.Y.) (4 New York stores, including leased departments)	98.0
Ohrbach's (AMCENA Corp., New York, N.Y.) (12 stores: N.Y. 3, N.J. 3, Calif. 6)	175 to 180
Plymouth Shops (Allied Stores, New York, N.Y.) (45 stores)	49.0
Saks Fifth Avenue (Batus Inc., New York, N.Y.) (34 stores: N.Y. 4, plus a small Southampton unit; N.J. 2, Pa. 2, Md. 1, N.H. 1, Mass. 1, Mich. 2, Ohio 1, Ill. 3, Ga. 1, Fla. 3, Tex. 1, Ariz. 1, Southern Calif. 5, Northern Calif. 3, Mo. 1, Nev. 1)	740.0
Fifth Avenue (4-year renovation program completed in 1982)	180.0+
(Stamford Town Center Mall, Conn., branch was opened March 1983. Expected to reach a volume of $15 million by its 3rd yr.)	
Available sales estimates for branch stores in other areas:	
North Central:	
Detroit area (3 stores)	39.0
Chicago area (3 stores)	65.0
(A store in Country Club Plaza, Kansas City, was opened in August 1982. Expected 1st year volume: $13 million)	
South:	
Dallas Galleria opened in Oct. 1982. Expected volume 1st year: $20.0 million	
Houston (1 store)	30.0+
(A 2nd Houston store--West Oaks Mall--was opened Aug. 1983. Expected 1st year volume: $12-$13 million)	
(A New Orleans store was opened in Oct. 1983; volume of $15 million expected within 3 years)	

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
NEW YORK	
New York City Area (continued)	
Saks Fifth Avenue (continued)	
West:	$ 71.0
Southern California (5 stores)	
(A 2nd San Diego branch--Saks' 9th Calif. store--was opened in Sept. 1983. Expected to reach an annual rate of $12 million in 3 years)	
San Francisco area (3 stores)	40.0+
Union Square	30.0
(A branch store is to be opened in Cincinnati, Ohio, in March 1984)	
Syms (11 specialty stores)	152.0
John Wanamaker, Liberty Street (1 store)	6.0
Oneonta	
Bresee's Oneonta Department Store (1 store)	5.0
Patchogue	
Swezey & Newins (3 N.Y. stores)	20.0
Rochester	
B. Forman & Co. (7 N.Y. stores)	20.0+
McCurdy & Co. (7 N.Y. stores)	20.0+
Sibley's (Associated Dry Goods, New York, N.Y.) (15 N.Y. stores)	160.0
Rome	
Alfred's Department Store (2 stores)	2.7
Schenectady	
The Carl Co. (6 N.Y. stores)	10.0
Seaford	
Mid-Island Department Stores (6 L.I., New York, stores)	24.0
Syracuse	
The Addis Co. (4 N.Y. Stores)	10.0
Chappell's Department Store, Northern Light Shopping Center (6 N.Y. stores)	25.0
Dey's (Allied Stores, New York, N.Y.) (4 stores)	40.0
Troy	
Stanley's (1 store)	2.0
White Plains	
Howland Steinbach (Supermarkets General, Woodbridge, N.J.) (28 stores: Conn. 6, N.H. 1, N.Y. 11, Mass. 4, N.J. 6)	110.0
PENNSYLVANIA	
Allentown	
Hess's (Crown American Corp., Johnstown, Pa.) (29 stores: Pa. 25, Md. 1, N.Y. 3) (Hess's acquired Penn Traffic Co.'s 6 department stores and 2 specialty stores, Western Pa., in Feb. 1982, adding $30 million in company sales volume. Plans to build 3 new stores a year for next 5 years.)	239.6

(Allentown continued)

DEPARTMENT STORE SALES

NORTHEAST

PENNSYLVANIA

	Approx. Sales (Millions of $)
Allentown (continued)	
H. Leh & Co. (3 stores)	$ 15.0
Aston	
The Dry Goods (SCOA Industries, Columbus, Ohio) (5 stores: Del. 3, N.Y. 1, Pa. 1)	80.0
Clearfield	
Leitzinger Bros. (1 store)	2.0
Easton	
Orr's Department Store (4 stores: Pa. 3, N.J. 1)	5.0+
Harrisburg	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (6 Pa. stores, not including stores operated out of Levittown Pa. headquarters)	55.0+
Hazelton	
P. Deisroth's Son's (2 Pa. stores)	5.0
Honesdale	
Katz Bros. (1 store)	2.0
Johnstown	
Glosser Bros. (1 store) (Also operates Gee Bee Discount Stores)	130.0
Lancaster	
Watt & Shand (2 Pa. stores)	25.0
Lehighton	
Bright Stores Inc. (1 store)	4.5
Levittown	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (8 stores: Pa. 6, N.J. 1, Del. 1)	70.0
Lewistown	
Danks & Co. (4 Pa. stores)	5.7
Philadelphia Area	
Gimbels-East (Batus, Inc., New York, N.Y.) (combined with Gimbels New York Apr. 1983 for a 20-store total)	417.0
10-stores: Pa. 8, N.J. 2	140.0
Strawbridge & Clothier (12 department stores plus 17 Clover Stores)	472.3
Department stores (12 stores: Pa. 7, N.J. 3, Del. 2)	290.0+

(Philadelphia Area continued)

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
NORTHEAST	
PENNSYLVANIA	
Philadelphia Area (continued)	
John Wanamaker (Carter Hawley Hale, Los Angeles, Calif.) (16 stores: Pa. 11, N.J. 2, N.Y. 2, Del. 1)	$ 350.0
(Bloomingdale's, New York, N.Y. opened a store at Willow Grove, Pa. in August 1982. Volume is expected to reach $20 million in 1983. Also operates a unit in King of Prussia which has a volume of $20.0+ million).	
(A&S, New York, operates a store at Willow Grove which was opened in Oct. 1982 and at King of Prussia, which are expected to have combined sales of about $35 million in 1983)	
Pittsburgh	
Gimbels-Pittsburgh (Batus Inc., New York, N.Y.) (7 Pa. stores)	148.0
Joseph Horne Co. (Associated Dry Goods, New York, N.Y.) (13 stores: Pa. 11, Ohio 2--plus 2 Boston stores in Pa.)	165.0
Kaufmann's Department Stores (May Department Store Co., St. Louis, Mo.) (10 stores: Pa. 7, Ohio 2, Ill. 1)	268.6
(A Charleston, W.Va., store was opened in 1983)	
Reading	
Boscov's Dept. Stores (9 stores: Pa. 8, Del. 1)	165.0
Scranton	
Cleland-Simpson Co. (John Wanamaker, Philadelphia, Pa.) (1 store)	20.0
Uniontown	
Metzler's Dept. Store (2 Pa. stores)	4.0
York	
S. Grumbacher & Sons (14 stores under various names)	50.0+
NORTH CENTRAL	
ILLINOIS	
Bloomington	
Rolands of Bloomington Inc. (2 Ill. stores)	5.0
Champaign	
Robeson's Inc. (1 store)	7.0
Chicago Area	
Baskin Clothing Co. (Hart Schaffner & Marx, Chicago, Ill.) (22 stores)	40.0
Bonwit Teller (Bonwit Teller, New York, N.Y.) (2 stores)	21.0+
Michigan Avenue	14.0
Oakbrook	7.0+

(Chicago Area continued)

DEPARTMENT STORE SALES

NORTH CENTRAL

ILLINOIS

Chicago Area (continued)

	Approx. Sales (Millions of $)
Carson Pirie Scott & Co. (24 stores in Department Store Div.)	$ 323.4
Chicago area (16 department stores, 2 specialty stores)	260.0
State Street	75.0
Edens Plaza	23.0
Evergreen Plaza	26.0
Gateway	6.0
Lakehurst	8.0
Lincoln Mall (Matteson)	13.5
North Riverside	16.0
Orland Sq.	13.5
Randhurst	21.0
South Lakes	11.5
Woodmar (Hammond, Ind.)	10.5
Yorktown	29.0
Crawford Department Stores (3 Ill. stores)	12.5
Evans Inc. (8 stores, excl. fur departments)	23.0
K mart (K mart, Troy, Mich.) (64 Chicago area stores)	385.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (7 Chicago stores)	103.0
Water Tower Place	29.0+
Northbrook Court	17.0
Lytton's (Henry C. Lytton & Co., Chicago, Ill.) (13 stores)	40.0+
Madigan Bros., River Forest (5 specialty stores)	30.0
I. Magnin (I. Magnin, San Francisco, Calif. (3 stores)	48.2
Northbrook Court	12.9
Michigan Avenue	26.7
Oakbrook Center	8.6
Marshall Field (Batus Inc., New York, N.Y.) (20 stores: Ill. 17, Wis. 1, Tex. 2)	605.0
Chicago Division (18 stores)	570.0
State Street	153.0
Oakbrook	58.0
Old Orchard	73.0
River Oaks	33.0
Water Tower Place	50.0
Woodfield	42.0
Southern Division	
Galleria, Houston	24.0
Galleria, Dallas (opened Oct. 1982; expected 1st year volume: $25 million)	
Montgomery Ward (16 Chicago area stores)	264.0
Neiman Marcus (Neiman Marcus, Dallas, Tex.) (2 stores)	40.1
Northbrook	27.1
Oakbrook	13.0
(A Michigan Ave. store was opened in Nov. 1982; expected 1st year volume: $40 million)	

(Chicago Area continued)

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
ILLINOIS	
Chicago Area (continued)	
J.C. Penney (J.C. Penney, New York, N.Y.) (26 stores)	$ 400.0
Brickyard	26.0
Woodfield	50.0
Ford City	42.0
North Riverside Park	30.0
Joliet Mall	14.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (3 Chicago area stores)	65.0
Michigan Avenue	32.0
Sears, Roebuck (Chicago area: 22 department stores, 7 surplus stores)	775.0+
State Street	25.0
Hawthorn	25.0
Northbrook Court	20.0
Oakbrook	35.0
River Oaks	35.0
Woodfield	35.0
Stanley Korshak (RV Ltd., Chicago, Ill.)	30.0+
(Michigan Ave. store opened in Aug. 1983. Expected 1st year volume: about $20.0 million)	
Spurgeon Mercantile Corp. (90 stores in Ill., Ind., Ia., Mich., Minn., Wis.)	57.0
Wieboldt Stores Inc. (Schottenstein Stores Corp., Columbus, Ohio) (14 Chicago area stores)	179.1
State Street	33.1
Ford City	22.5
Columbia	
Weilbacher's (1 store)	3.8
De Kalb	
M.F. Malone (1 store)	3.0
Elgin	
Ackemann Bros. (2 Ill. stores)	5.0
Joseph C. Spiess Co. (3 Ill. stores)	6.0
Granite City	
The Glik Co. (12 Ill. stores)	6.0
Peoria	
P.A. Bergner & Co. (25 stores: Ill. 22, Wis. 3) (Also operates Myers Bros., Springfield, Ill.)	186.0
(The 16-store Bergner Division was merged with Bergner-Weise Co., Rockford, Ill. in Feb. 1982)	
Szold's Inc. (3 stores, including Walton's Fairbury, Ill.)	13.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
ILLINOIS	
Rock Island	
McCabe's (1 store)	$ 5.0
St. Charles	
Colson's Department Store (2 Ill. stores)	3.0
Tinley Park	
The People's Store of Roseland (1 store)	10.0
INDIANA	
Elkhart	
Ziesel Dept. Stores (2 Ind. stores)	4.8
Hammond	
Edward C. Minas Co. (2 Ind. stores)	6.0
Indianapolis	
L. S. Ayres & Co. (Associated Dry Goods Corp., New York, N.Y.) (13 stores in Ind.) (To be merged with H. & S. Pogue, Cinn.)	200.0
William H. Block Co. (Allied Stores, N.Y.) (9 Ind. stores)	80.0+
Knox	
Weinberg Stores (2 Ind. stores)	2.5
La Porte	
Levine's Boston Stores Inc. (2 Ind. stores)	3.0
Muncie	
Ball Stores (3 stores in Ind. Also operates Ball Stores Collegienne Shops)	12.0
New Albany	
The Fair Store (1 store)	2.3
Richmond	
The George H. Knollenberg Co.	3.0
Terre Haute	
Root Dry Goods (Mercantile Stores, New York, N.Y.) (3 stores: Ind. 2, Ill. 1)	6.0
Schultz & Co. (1 store)	4.0
Valparaiso	
J. Lowenstine & Sons (1 store)	3.3

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
IOWA	
Cedar Rapids	
Armstrong Inc. (1 store)	$ 25.0
Davenport	
Petersen-Harned-Von Maur Inc. (10 stores: Ia 9, Ill. 1)	25.0+
Des Moines	
Younker's Dept. Store (Equitable of Iowa Companies, Des Moines, Ia.) (26 stores: Ia. 21, Ill. 1, Minn. 1, Neb. 2, S.C. 1, plus 3 home furnishings stores)	166.6
Dubuque	
Rosheks (Div. of Gamble Dept. Stores, Chicago, Ill.) (1 store)	10.0
MICHIGAN	
Ann Arbor	
Goodyear's (1 store)	2.0
Bay City	
W.R. Knepp Co. (3 Mich. stores)	10.0
Detroit Area	
Crowley's (10 Mich. stores)	76.4
Hudson's (Dayton Hudson Corp., Minneapolis, Minn.) (20 stores: Mich. 17, Ohio 1, Ind. 2)	683.8
Detroit area (8 stores)	475.0
Downtown Detroit store (closed Jan. 1983)	40.0-
(Opened stores in Lansing, Mich. in 1982 and Battle Creek, Mich. in 1983)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (2 stores)	39.0
Fairlane Town Center Mall	15.0
Somerset Mall	24.0
Sears Roebuck (10 Detroit area stores) (Southfield closed Apr. 1983)	400.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (4 stores)	37.0
Winkelman Stores Inc. (88 stores: Mich. 58, Ohio 20, Ill. 10)	99.2
Detroit area (39 stores)	54.0
Escanaba	
The Fair Store (8 Mich. stores under various names)	4.0
Grand Rapids	
Gantos Inc. (39-unit women's spec. chain, Mich., Ill., Ind.)	47.0
Herp's Co. (Allied Stores, New York, N.Y.) (6 Mich. stores)	
Grand Rapids Store	20.0
Paul Steketee & Sons Co. (6 Mich. stores)	27.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
MICHIGAN	
Jackson	
L.H. Field (Allied Stores, New York, N.Y.) (1 store)	$ 5.0
Jacobson Stores (17 department stores: Fla. 6, Mich. 10, Ohio, 1. Also 7 home furnishings stores and 1 children's wear store)	181.3
Kalamazoo	
Gilmore Bros. (3 Mich. stores)	12.0
Saginaw	
W.C. Wiechmann Co. (3 Mich. stores)	8.5
Sandusky	
Polewack Stores (6 Mich. stores)	3.0
Traverse City	
J.W. Milliken (3 Mich. stores)	5.0+
Trenton	
Mulias & Ellias Dept. Store (1 store)	2.0
MINNESOTA	
Cloquet	
The Johnson Co. (1 store)	2.6
Detroit Lakes	
L. & J. Norby Co. (1 department store, 3 specialty stores in Minn.)	3.6
Duluth	
Duluth Glass Block Stores (Mercantile Stores, New York, N.Y.) (1 store plus O.J. DeLendrecie Co., Fargo, N.D. store)	23.0+
Wahl's Dept. Store (1 store plus Griffiths, Grand Forks, N.D.)	5.0
Mankato	
Bretts Dept. Stores (6 Minn. stores) (Hutchinson Mall store opened Aug. 1982)	15.0
Minneapolis	
Dayton's (Dayton Hudson, Minneapolis, Minn.) (13 stores: Minn. 9, N.D. 2, S.D. 1, Wis. 1, plus 3 homefurnishings stores)	437.3
Donaldson's (Allied Stores, New York, N.Y.) (9 stores: Ia. 2, Minn. 7)	100.0+
Powers Dry Goods (Associated Dry Goods, New York, N.Y.) (7 Minn. stores)	45.0
Salkin & Linoff (100+ specialty stores under various names)	85.0
New London	
The Big Store Inc. (1 store)	2.1

DEPARTMENT STORES SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
MINNESOTA	
Redwood Falls	
Ehlers Dept. Stores (6 stores: Minn. 5, Ia. 1)	$ 6.0
Rochester	
Massey's (1 store)	3.0
St. Cloud	
Fandel (2 department stores, 2 Intrigue Spec. Stores in Minn.)	6.0+
G.R. Herberger's Inc. (24 stores: Minn. 9, Mont. 3, N.D. 3, S.D. 2, Neb. 3, Wis. 3, Wyo. 1)	50.0-
Joplin	
Newman's (5 stores: Mo. 2, Okla. 2, Kans. 1)	21.0
Kansas City	
Halls Dept. Store (Hallmark Cards, Kansas City, Mo.) (3 Mo. stores)	35.0
Harzfeld's (Allied Stores, New York, N.Y.) (8 specialty stores: Kans. 2, Mo. 4, Okla. 2)	30.0
The Jones Co. (Mercantile Stores, New York, N.Y.) (7 Mo. stores)	150.0
Macy's Midwest (R.H. Macy, New York, N.Y.) (19 stores: Kans. 5, Mo. 8, Ohio 6) (Red Bridge Shopping Center Store in K.C. was closed)	200.0
Swanson's (Hallmark Cards, Kansas City, Mo.) (1 specialty store)	9.5
Woolf Bros. (9 stores: Mo. 5, Kans. 1, Tex. 1, Tenn. 1, Okla. 1)	35.0
(Saks Fifth Avenue, New York, opened a store Aug. 1982 in Country Club Plaza. Expected 1st year volume: $13 million)	
St. Joseph	
Hirsch's (The Dunlap Co., Fort Worth, Tex.) (1 store)	2.3
Townsend & Wall Co. (1 specialty store)	2.5
St. Louis	
Boyd's (Cluett, Peabody & Co., New York, N.Y.) 8 specialty stores (To be sold)	30.0
Famous Barr (May Department Stores, St. Louis, Mo.) (15 stores: Mo. 12, Ill. 3) (Opened a store in Chesterfield, Mo. in 1983)	363.5
Stix, Baer & Fuller (Associated Dry Goods, New York, N.Y.) (12 stores: Ill. 1, Kans. 1, Mo. 10) (To be acquired by Dillard's in 1984)	139.4
Sedalia	
C.W. Flower D. G. Co. (2 specialty stores)	2.0
Springfield	
Heer's Inc. (Allied Stores, New York, N.Y.) (2 stores)	20.0+

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
NEBRASKA	
Chadron	
Anderson's Inc. (3 stores)	$ 2.5
Fremont	
George Schwester's & Sons (9 stores in Neb.)	7.5
Lincoln	
Miller & Paine Inc. (3 Neb. stores)	10.0
Omaha	
J.L. Brandeis & Sons (10 stores: Ia. 3, Neb. 7)	95.0
Philips Stores (7 stores: Ia. 2, Neb. 5)	11.0
NORTH DAKOTA	
Fargo	
O.J. de Lendrecie Co. (Duluth Glass Block Stores, Duluth, Minn.) (1 store)	4.0
Larimore	
Johnson Stores Co. (16 N.D. specialty stores)	5.0
OHIO	
Akron	
The M. O'Neil Co. (May Department Stores, St. Louis, Mo.) (10 Ohio stores)	140.1
Ashtabula	
Carlisle's (9 stores: Ohio 5, Pa. 4)	45.0+
Bowling Green	
Fred W. Uhlman & Co. (13 Ohio department stores plus specialty stores in Ohio, Ind., Mich.)	19.0
Cincinnati	
Ben's Department Store (2 Ohio stores)	2.5
McAlpin Co. (Mercantile Stores, New York, N.Y.) (9 stores: Ohio 6, Ky. 3)	240.0
H. & S. Pogue Co. (Associated Dry Goods, New York, N.Y.) (5 stores: Ohio 5, Ky. 1) (To be merged with L.L. Ayres, Indianapolis)	72.0
Shillito Rikes (Federated Department Stores, Cincinnati, Ohio) 14 stores: Ohio 10, Ky. 4, resulting from the merger in April 1982 of Shillito with Rikes, Dayton, Ohio)	342.9
(Saks Fifth Avenue will open a store in March 1984.)	
Cleveland	
Higbee Co. (11 stores in Ohio) (The downtown Youngstown store closed; took over former Halle's unit, Summit Mall, Akron)	215.2
The May Co. (May Dept. Stores, St. Louis, Mo.) (10 stores in Ohio)	189.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
OHIO	
Columbus	
F. & R. Lazarus (Federated Department Stores, Cincinnati, Ohio) (17 stores: Ohio 11, Ind. 5, W.Va. 1)	$ 389.3
(2 former Halle units were re-opened by new owners as the Union Stores in Sept. 1982)	
Dayton	
Elder-Beerman Department Store Div. (Elder-Beerman Stores Corp., Dayton) (21 department stores)	200.0
East Liverpool	
D. M. Ogilvie & Co. (1 store)	2.5
Jackson	
Stiffler Stores Inc. (10 stores)	4.0
Lancaster	
Hickle's (1 store)	2.0
Lima	
Gregg's Inc. (1 store)	3.0
Portsmouth	
Marting Bros. (2 Ohio stores)	7.0
Springfield	
Edward Wren Store (Allied Store Corp., New York, N.Y.) (2 stores)	9.0
Toledo	
The Lion Dry Goods Co. (Mercantile Stores Co., New York, N.Y.) (3 department stores, 2 specialty stores in Ohio)	80.0
Wooster	
Wm. Annat Co. (1 store)	2.0
H. Friedlander Co. (1 store)	5.0
Youngstown	
Strouss (May Department Stores, St. Louis, Mo.) (10 stores: Ohio 8, Pa. 2. Also operates Rivets Specialty Stores)	100.5
WISCONSIN	
Appleton	
Campbell Stores Co. (8 Wis. specialty stores)	3.0
Brookfield	
T.A. Chapman Co. (8 Wis. stores incl. 2 Manchester's Specialty Stores)	12.0
Kohl's Department Stores (Batus Inc., New York, N.Y.) (25 stores: Wis. 18, Ill. 1)	140.0

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
NORTH CENTRAL	
WISCONSIN	
Madison	
Emporium of Madison (3 Wis. stores)	$ 3.0
Yost's Bros. Inc. (5 Wis. stores)	6.0
Marinette	
Lauerman Bros. Co. (5 stores: Wis. 4, Mich. 1)	5.3
Milwaukee (also see Brookfield)	
Boston Store (Federated Department Stores, Cincinnati, Ohio) (8 stores in Milwaukee area)	117.9
T.O. Chapman (6 department stores, 2 specialty stores)	15 to 20
Gimbels-Midwest (Batus Inc., New York, N.Y.) (11 Wis. stores)	171.0
8 Milwaukee stores	130.0+
A. Goldman & Sons (1 store)	4.0
Sheboygan	
H.C. Prange Co. (also Green Bay) (19 stores: Wis. 15, Ill. 2, Mich. 2)	107.0
Wisconsin Rapids	
Johnson Hills Department Stores (4 Wis. stores)	10.0
SOUTH	
ALABAMA	
Albertville	
Worth Ratliff (10 specialty stores)	2.5
Anniston	
Hudson Department Stores (Belk Stores Services, Charlotte, N.C.) (6 stores)	3.0
Birmingham	
Parisian Inc. (9 specialty stores in Ala.)	75.0+
Pizitz, Inc. (11 Ala. stores)	82.5
Huntsville	
Dunnavant's Inc. (1 store)	3.0
Mobile	
C. J. Gayfer Co. (Mercantile Stores, New York, N.Y.) (12 stores: Ala. 3, Fla. 6, Miss. 3)	250.0
Montgomery	
Gayfers (Mercantile Stores, New York, N.Y.) (6 stores)	115.0

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
ARKANSAS	
El Dorado	
The El Dorado House (2 stores)	$ 2.2
J.A. West Co. (11 stores in Ark., La., Mo., Okla., Tex. Also 4 Gibson's Department Stores)	24.0
Fayetteville	
Campbell-Bell Inc. (3 Ark. stores)	5.5
Fort Smith	
The Boston Store (The Boston Store Dry Goods Co., Fort Smith, owned by Wickes Companies, Inc., Santa Monica, Cal.) (Stores in Ark., Tex., and La.)	30.0
Arkansas (2 stores)	10.0
Hunt Dry Goods (8 stores: Ark. 6, Okla. 1, Tex. 1)	10.5
Little Rock	
M.M. Cohn (12 specialty stores: Ark. 4, Okla. 4, Tenn. 4)	50.0
Dillard Dept. Stores--Little Rock Div. (Dillard Dept. Stores Inc., Little Rock, Ark.) (18 stores: Ark. 6, La. 4, Tenn. 5, Tex. 3)	208.0
Magnolia	
Talbot's Department Store (1 store)	2.2
Newport	
Van Atkins Stores (7 stores: Ark. 6, Miss. 1)	4.0
DELAWARE	
Laurel	
R. E. Powell & Co. (3 stores)	2.3
Wilmington	
Kennard's Dept. Stores (4 Del. stores)	5.0
DISTRICT OF COLUMBIA	
Washington Area (Including nearby Virginia and Maryland stores. Also see Baltimore, Md. listings)	
Garfinckel's (Allied Stores, New York, N.Y.) (8 specialty stores plus two hotel shops)	90.0
Georgetown Park Mall	3.8
Hecht's (May Dept. Stores Co., St. Louis, Mo.) (24 stores: Md. 17, D.C. 1, Va. 6)	415.3
La Vogue (La Vogue, Richmond, Va.) (1 store)	2.1
Raleigh's Store (12 specialty stores)	60.0+
Woodward & Lothrop (16 stores: D.C. 2, Md. 10, Va. 4)	357.5
(Bradlees Dept. Stores, a discount chain, opened 10 stores in the D.C. area in 1983. Expected 1st year volume: $100 million)	

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
FLORIDA	
Bradenton	
Beall's Dept. Stores (26 apparel specialty stores in Florida)	$ 55.0
Jacksonville	
Furchgott's Inc. (6 Fla. stores)	20.0
May-Cohens (May Dept. Stores, St. Louis, Mo.) (6 Fla. stores)	57.9
Miami-Palm Beach Area	
Burdine's (Federated Dept. Stores, Cincinnati, Ohio) (23 Fla. stores) (Melbourne and Tampa stores were opened in 1983; 3 Fla. stores to be opened in 1984: Coconut Grove, Miami; Gainsville, Coral Springs)	582.8
J. Byron's (Jack Eckerd Corp., Clearwater, Fla.) (45 Fla. stores)	168.4
Jordan Marsh-Florida (Allied Stores, New York, N.Y.) (14 Fla. stores) (Miami International Mall store opened Aug. 1982; Melburne, Fla. store opened Feb. 1983)	240.0
Lord & Taylor (Lord & Taylor, New York)	
Cutler Ridge (Aventura Mall, Miami, opened Jan. 1983; expect $10 million the first year. Fort Lauderdale store opened Oct. 1983; expect $19 million the 1st year)	10.0
(Macy's, New York opened a store in Aventura Mall, Miami, Fla. in Oct. 1983 which is expected to reach a volume of over $50 million in its first year.)	
Tampa-St. Petersburg Area	
Maas Bros., Tampa (Allied Stores, New York, N.Y.) (20 Fla. stores)	270.0
Robinson's of Florida, St. Petersburg (Associated Dry Goods, New York, N.Y.) (7 stores in Fla.)	80.0
Winter Park	
Ivey's Florida (Batus Retail Div., New York, N.Y.) (10 Fla. stores)	85.0
GEORGIA	
Atlanta Area	
Davison's (R.H. Macy, New York, N.Y.) (13 stores: Ga. 12, S.C. 1) (Gwinnett Place, Atlanta, Ga., store to open in Spring 1984) (An eighth metropolitan Atlanta store was opened in the Perimeter Mall in Sept. 1982)	250.0
H. Kessler & Co. (6 Ga. stores plus wholesaling operation)	14.0
Muse's (George Muse Clothing Co.) (7 Atlanta area stores)	15.0
Rich's (Federated Dept. Stores, Cincinnati, Ohio) (16 stores: Ga. 12, Ala. 2, S.C. 2, plus Outlet Home Store) (Rich's also operated 21 Richway Discount stores with a volume of $321.6 million)	430.1
Sunshine Dept. Stores (6 stores)	6.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
GEORGIA	
Augusta	
J.B. White & Co. (Mercantile Stores, New York, N.Y.) (4 stores: Ga. 2, S.C. 2)	$ 100.0
Canton	
Jones Mercantile Co. (1 store)	2.5
Columbus	
J. A. Kirven (3 stores in Ga.)	8.0
Cordele	
B. C. Moore (B. C. Moore & Sons, Wadesboro, N.C.) (Buying office for 28 stores in Ala. and Ga.)	20.0
Marietta	
Saul's Dept. Stores (7 Ga. stores)	4.0
Savannah	
Allied Outlet Stores (67 stores in Ga. and S.C.)	35.0
Levy's of Savannah Inc. (Allied Stores, New York, N.Y.) (2 stores)	6.5
KENTUCKY	
Danville	
Hub Frankel Co. (1 store)	5.5
Franklin	
Young's (4 stores)	3.0
Louisville	
J. Bacon & Co. (Mercantile Stores, New York, N.Y.) (6 stores: Ky. 5, Ind. 1)	95.0
Ben Snyder Inc. (8 stores: Ind. 1, Ky. 7)	25.0
Shapira Corp. (18 Ky. stores)	15.0
Stewart Dry Goods (Associated Dry Goods, New York, N.Y.) (7 stores: Ky. 6, Ind. 1)	66.0
Owensboro	
S.W. Anderson Co. (2 stores)	7.0
Vicco	
Martin's Department Stores (5 Ky. stores)	3.0
LOUISIANA	
Alexandria	
Wellan's (3 La. stores)	10.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
LOUISIANA	
Baton Rouge	
Bart-Well Inc. (operates Weill's Dept. Stores) (13 La. stores)	$ 6.0
Goudchaux's Inc. (6 La. stores, including 3 suburban Maison Blanche stores purchased in 1982 which had a combined sales volume of about $50 million)	155.8
DeRidder	
West Bros. Inc. (24 general merchandise stores in La. and Miss.)	59.0
Lake Charles	
Muller Co. Ltd. (Allied Stores, New York, N.Y.) (1 store)	10.0
Many	
Nichols Dry Goods Co. (16 stores: La. 15, Tex. 1)	9.8
New Orleans	
Leon Godchaux Clothing Co. (7 stores: La. 6, Miss. 1)	30.0
D.H. Holmes (15 stores: La. 13, Miss. 1, Ala. 1; plus car care centers and shoe stores)	240.7
Krauss Co., Ltd. (1 store)	22.0
(Saks Fifth Avenue store opened Oct. 1983. Expect to reach an annual rate of $15 million in 2 years)	
Ruston	
Lewis & Co. (1 store. Also operates Fever Tree and Stagg Shop)	4.0
Shreveport	
Rubenstein's Inc. (4 La. stores)	12.0
MARYLAND	
Baltimore (Also see DISTRICT OF COLUMBIA listings)	
Brager-Gutman (HRT Ltd., Los Angeles, Calif.) (2 gen. mdse. stores in Md.)	13.0
L. Epstein (7 Baltimore stores) (Also operates a wholesaling business)	25.0
Hochschild, Kohn Inc. (Supermarkets General, Woodbridge, N.J.) (10 Md. stores)	75.9
Hutzler's (8 Md. stores. A replacement store for the downtown unit will open in the Fall, 1984 in the Atrium)	75.0
Stewart's (Caldor Div., Associated Dry Goods, New York, N.Y.) (5 stores)	60.0
MISSISSIPPI	
Columbus	
Egger's Dept. Stores (2 Miss. stores)	4.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
MISSISSIPPI	
Jackson	
McRae's Inc. (12 Miss. stores; also a shoe store)	$ 124.4
Magee	
McAlpin's Dept. Store (1 store)	2.5
Meridian	
Marks Rothenberg Co. (3 stores)	5.0
Oxford	
The J.E. Neilsen Co. (1 store)	2.4
Tupelo	
R. W. Reid Co. (2 stores)	3.0
NORTH CAROLINA	
Burlington	
Belk-Beck Co. of Burlington (Belk Stores Services, Charlotte, N.C.) (4 stores)	15.0
Charlotte	
Ivey's Carolinas (Batus Retail Div., New York, N.Y.) (14 stores: N.C. 13, S.C. 1)	105.0
Elkin	
Spainhour's Store (7 N.C. stores)	6.0
Fayetteville	
Capitol of Fayetteville (3 N.C. stores)	5.0
Franklin	
People's Dept. Store (4 stores: N.C. 3, Ga. 1)	2.4
Raleigh	
Boylan-Pearce Inc. (1 store)	6.0
Shelby	
A.V. Wray & Six Sons (4 N.C. stores)	3.5
Whiteville	
Leder Bros. (10 stores: N.C. 7, S.C. 3)	6.0
Winston-Salem	
Davis Inc. (3 stores)	6.5

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
OKLAHOMA	
Checotah	
Sharpe Dept. Store (19 Okla. stores)	$ 9.0+
Chickasha	
Hicks Dept. Stores (5 stores)	2.0
Dewey	
Peter's Inc. (6 stores)	2.5
Oklahoma City	
John A. Brown Co. (Dayton Hudson, Minneapolis, Minn.) (6 deptartment stores in Okla.)	86.1
Langston Co. (3 Okla. City stores)	10.0
Shawnee	
Newton Wall Co. (15 stores: Okla. 10, Ark. 2, Miss. 3)	8.0
Tulsa	
Froug's Inc. (10 Okla. stores)	20.0+
The Vandever Co. (Dunlap Co., Fort Worth, Tex.) (2 Okla. stores)	10.0
(Sanger Harris, Dallas, Tex., opened a store in Tulsa in Aug. 1982)	
SOUTH CAROLINA	
Anderson	
Gallant-Belk (Belk Store Services Inc., Charlotte, N.C.) (6 S.C. stores)	10.0
Charleston	
Condon's Dept. Store (2 stores)	5.0
Kerrison's Dept. Store (4 S.C. stores)	11.0
Cheraw	
B.C. Moore (B.C. Moore & Sons, Wadesboro, N.D.) (45 stores in North and South Carolina)	48.0
Columbia	
James L. Tapp Co. (4 S.C. stores)	12.0+
J.B. White & Co. (Mercantile stores, New York, N.Y.) (2 stores)	15.0
Greenville	
Meyers-Arnold Co. (9 stores: S.C. 5, N.C. 2, Ga. 2)	26.0
Hartsville	
J.L. Coker (2 S.C. stores)	3.5
Spartanburg	
The Aug. W. Smith Co. (3 S.C. stores)	6.0

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
SOUTH	
TENNESSEE	
Alcoa	
Proffitt's Dept. Stores (4 Tenn. stores)	$ 35.0
Bristol	
H.P. King (2 specialty stores in Tenn.)	3.5
Chattanooga	
Loveman's (5 stores: Tenn. 4, Ga. 1)	22.0
Clarksville	
Parks-Belk Co. (Belk Stores Services, Charlotte, N.C.) (5 stores)	20.0
Jackson	
Kisber's Dept. Store (2 Tenn. stores)	6.0+
Knoxville	
Millers Inc. (Allied Stores, New York, N.Y.) (11 stores: Tenn. 9, Ga. 1, Va. 1)	80.0
Ira A. Watson (17 stores: Ala. 1, Ky. 8, Tenn. 4, Va. 1, W.Va. 3)	41.0
Memphis	
Dillard's (branches of Dillard Dept. Store Div., Little Rock, Ark.) (5 stores)	45 to 50
Nashville	
Cain-Sloan (Allied Stores, New York, N.Y.) (4 stores in Tenn.)	50.0
Castner, Knott Dry Goods Co. (Mercantile Stores, New York, N.Y.) (10 stores: Ala. 2, Ky. 1, Tenn. 7)	140.0
The Harvey Co. (8 stores: Ky. 1, Tenn. 7 incl. warehouse store)	32.0
Downtown Nashville (to be closed Jan. 1984)	4.0
TEXAS	
Abilene	
Thornton's Department Stores (P.N. Hirsch & Co., St. Louis, Mo.) (7 Tex. stores)	10.0
Austin	
Scarbrough's (4 Texas department stores plus 2 boutiques)	25.0
Beaumont	
The Fair Inc. (24 specialty stores: Tex. 18, La. 6) (Also operates a wholesaling business)	26.0
White House Co. (Boston Stores D.G. Co., Fort Smith, Ark.) (3 stores: Tex. 2, La. 1)	20.0

DEPARTMENT STORE SALES

SOUTH

TEXAS

Dallas

	Approx. Sales (Millions of $)
Dillard Department Stores, Central Division, Fort Worth	
Dallas-Fort Worth (11 stores)	$ 118.0
Valley View	34.0
(Mesquite store opened August 1982)	
Frost Bros. (Frost Bros., San Antonio, Tex.)	
NorthPark (To be enlarged)	6.0+
Joske's-Dallas/Phoenix (Allied Stores, New York, N.Y.) (12 stores: Texas 10, Ariz. 2)	110 to 115
Dallas area (10 stores)	100.0+
NorthPark	27.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	31.7
NorthPark	16.0
Prestonwood Town Center	12.5
Collin Creek Mall, Plano	3.2
Marshall Field (Marshall Field, Chicago, Ill.)	
Galleria (opened Oct. 1982) Expected 1st year volume:	25.0
Montgomery Ward (Montgomery Ward, Chicago, Ill.)	
Dallas-Fort Worth Area (12 stores)	135 to 140
Neiman-Marcus (Carter Hawley Hale, Los Angeles, Calif.) (18 specialty stores: Tex. 5, Ga. 1, Fla. 2, Md. 1, N.Y. 1, Ill. 2, Mo. 1, Cal. 4, Nev. 1)	450.0
Dallas-Fort Worth Area (4 stores)	150.0
NorthPark (to be enlarged in 1983)	53.0
Prestonwood Town Center	27.0
Other Neiman-Marcus stores (available 1982 estimates)	
Galleria, Houston, Texas	60.0
Fashion Valley, San Diego, Calif.	12.0
Beverley Hills, Calif.	39.5
Newport Beach, Calif.	15.0
San Francisco, Calif. (opened Nov. 1982) 2-month total:	14.0
Northbrook, Chicago, Ill.	27.1
Oakbrook, Chicago, Ill.	13.0
(In addition to the San Francisco store, new store openings in 1982 included a Fort Lauderdale, Fla. unit, in September 1983 openings included: Houston, (Feb.); Michigan Ave., Chicago (Nov.), which is expected to have a 1st year volume of $40 million. A Boston, Mass. store opening is scheduled for Feb. 1984)	
J.C. Penney (15 stores) (sales including catalog which represented 25%)	180.0
NorthPark	27.0
Sakowitz (Sakowitz Inc., Houston, Tex.) (1 store)	14 to 18
(also five boutiques)	

(Dallas Area continued)

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
TEXAS	
Dallas (continued)	
Sanger-Harris (Federated Department Stores, Cincinnati, Ohio) (14 stores: Tex. 13, Okla. 1) (In October 1982 Sanger-Harris was assigned responsibility for Levy's, Tucson, Ariz., which had a volume of $39.3 million in 1982 in 2 stores)	$ 329.2
Valley View Center	60.0
(A Tulsa, Okla. store was opened in August 1982; a second Tulsa store will open in 1983)	
Sears, Roebuck (Sears, Roebuck, Chicago, Ill.) (13 stores)	286.0
Valley View	45 to 50
Target Stores (Dayton-Hudson, Minneapolis, Minn.)	
Dallas-Fort Worth (11 stores)	190.0
(1982 store openings in Dallas Galleria, October: Saks Fifth Ave. --expected annual volume 1st year: $20 million; Marshall Field--expected annual volume 1st year: $25 million. A Bloomingdale's store opened in Valley View Center in October 1983, which is planned to reach a volume of $57 million the first year)	
Denison	
Lilley's Inc. (2 specialty stores)	4.2
El Paso	
Popular Dry Goods Co. (3 El Paso stores)	30.0
The United Inc. (10 stores: Ariz. 2, N.M. 2, N.Y. 1, Tex. 5)	5.0
The White House (The Dunlap Co., Fort Worth, Tex.) (2 stores: Tex. 1, N.M. 1)	15.0
Fort Worth (also see Dallas listings)	
R.E. Cox & Co. (5 stores in Texas, including 3 in Fort Worth)	25 to 30
Dillard Dept. Stores-Central Division (Dillard Dept. Stores Inc., Little Rock, Ark.) (26 stores: Kans. 2, Mo. 1, Okla. 8, Tex. 15)	300.0+
Dallas-Fort Worth area (11 stores)	118.0
Monnig's (9 stores in Texas)	40.0
Pace, Newsom & Moates Inc. (29 general merchandise stores in Texas)	25.0
Striplings & Cox (The Dunlap Co., Fort Worth, Tex.) (3 stores)	25.0+
Galveston	
Eiband's Dept. Store (1 store)	5.0
(Also operates a specialty store in Galveston)	
Houston	
Foley's (Federated Dept. Stores, Cincinnati, Ohio) (14 stores in Texas plus a warehouse operation)	597.7
(2 stores were opened in 1982--Austin and San Antonio; another San Antonio store opened in 1983.)	
Joske's-Houston (Allied Stores, New York, N.Y.) (10 Texas stores)	125.0

(Houston Area continued)

DEPARTMENT STORE SALES

SOUTH

TEXAS

	Approx. Sales (Millions of $)
Houston (continued)	
Kaplan's Dept. Store (1 store)	$ 2.3
Leonard's Dept. Stores (9 stores)	8.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	39.0
(The Galleria store is undergoing renovation and expansion, which is expected to boost sales to $26 million in 1st year. A 4th store, at West Oaks, is to be opened in Feb. 1984. It is expected to have a volume of $10 million in the 1st year of operation.)	
Marshall Field (Marshall Field, Chicago, Ill.) (1 store)	
Galleria	30.0
(Town & Country Center store opened Feb. 1983)	
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (1 store)	
Galleria	60.0
(Town & Country Center store opened Feb. 1983)	
Sakowitz Inc. (15 specialty stores, incl. 4 full-line stores in Houston plus 2 smaller units and 3 boutiques; 1 store in Amarillo, 1 in Dallas plus hotel boutiques; Scottsdale, Ariz. 1)	180.0
(A Midland, Tex. store was opened in Feb. 1982. A Tulsa, Okla. store is to open Feb. 1984 followed by a 2nd store in that city in the summer of 1984)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (1 store)	30.0+
(A 2nd store--West Oaks Mall--was opened Aug. 13. Expected 1st year volume: $12-$13 million)	
Laredo	
Richter's Dept. Store (2 stores)	10.0
Lubbock	
Hemphill-Wells Co. (4 Texas stores)	25.0+
Midland	
Grammer-Murphy, Inc. (1 store)	5.0
San Antonio	
Dillard Department Stores, Texas-New Mexico Division (Dillard Dept. Stores, Little Rock, Ark.) (21 stores: Texas 18, New Mexico 3)	203.0
Frost Bros. (Manhattan Industries, New York, N.Y.) (11 specialty stores in Texas)	110.0
Joske Bros. (Allied Stores, New York, N.Y.) (7 Tex. stores)	85.0
La Feria Dept. Stores (6 Texas stores)	15.0
Waco	
R.E. Cox, Fort Worth, Texas	10.0
Wichita Falls	
McClurkan's Dept. Store (4 Tex. stores)	10.0

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
VIRGINIA	
Arlington (also see DISTRICT OF COLUMBIA listings)	
Morton's (6 stores in D.C., Md.)	$ 10.0
Lawrenceville	
W.S. Peebles & Co. (43 stores plus wholesaling operation)	65.0
Martinsville	
Globman's Stores (3 stores: Va. 2, N.C. 1)	10.0
Norfolk	
Rice's-Nachmans (Phillips-Van Heusen Corp., New York, N.Y.) (8 specialty stores in Va.)	12.0
Smith & Welton (8 Va. stores)	18.0
Richmond	
Miller & Rhoads (Allied Stores, New York, N.Y.) (22 stores: Va. 17, N.C. 5)	110.0
Southern Dept. Stores, Inc. (6 stores)	5.0+
Thalhimer Bros. (Carter Hawley Hale, Los Angeles, Calif.) (25 stores: Va. 14, N.C. 10, S.C. 1) (A Memphis, Tenn. store opened in 1983)	206.0
Roanoke	
S.H. Heironimus Co. (4 Va. stores)	12.0+
Williamsburg	
Casey's Inc. (Southern Department Stores, Richmond, Va.) (1 store)	3.0+
WEST VIRGINIA	
Charleston	
A.W. Cox Dept. Store (16 stores: Ky. 5, Oh. 1, W.Va. 10)	10.0+
The Diamond Dept. Store (Associated Dry Goods, New York, N.Y.) (2 stores in W.Va.)	20.0
O.J. Morrison Dept. Stores (1 store)	2.5
Fairmont	
Hartley's Dept. Store (1 store)	4.0
Holden	
Island Creek Stores Co. (14 stores in W.Va., Va., Ky.)	8.0
Logan	
Sayer Bros. (S. & B. Wholesale Distributors) (5 stores)	7.0
Parkersburg	
Dils Bros. (2 W. Va. stores)	7.0

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
SOUTH	
WEST VIRGINIA	
Wheeling	
Goods Department Store Inc. (1 store)	$ 3.5
Stone & Thomas (14 department stores in W. Va.) (Also operates Crone's men's specialty stores)	75.0
WEST	
ARIZONA	
Douglas	
Phelps Dodge Mercantile Co. (6 stores: Ariz. 4, N.M. 2)	25.0+
Flagstaff	
Babbitt Bros. Trading Co. (9 Arizona stores)	12.0
Nogales	
Capin Mercantile Corp. (3 Ariz. department stores plus 13 specialty stores)	15.0
Phoenix/Scottsdale Area	
Broadway-Southwest, Mesa (Carter Hawley Hale, Los Angeles, Calif.) (10 stores: Ariz. 7, Nev. 2, N.M. 1)	120.0
Diamond's, Tempe (Dayton-Hudson, Minneapolis, Minn.) (13 stores: Ariz. 10, Nev. 3)	143.0
Goldwater's, Scottsdale (Associated Dry Goods, New York, N.Y.) (9 stores: Ariz. 7, N.M. 1, New. 1)	91.0
Joske's (Joske's, Dallas, Tex.) (2 stores in Phoenix)	10 to 15
Malcolm's Dept. Store, Phoenix (2 stores)	3.3
Tucson	
Levy's of Tucson (Assigned to Sanger-Harris Div. of Federated in Oct. 1982) (2 Tucson stores--the 2nd opened in 1982	39.3
Steinfeld's (3 Ariz. stores)	5.5
CALIFORNIA	
Alhambra	
Lieberg's (2 stores)	3.0
Bakersfield	
Brock's Dept. Store (2 stores)	17.0
Berkeley	
Hink's Department Store (1 store)	6.0
Burlingame	
J.M. McDonald Co. (10 stores)	30.0

DEPARTMENT STORE SALES

WEST

CALIFORNIA

	Approx. Sales (Millions of $)
Carmichael	
Lawrence's Dept. Store (4 stores)	$ 7.0
Carson	
The Boston Stores Inc. (12 stores: Ariz. 2, Calif. 10)	23.0
Castro Valley	
Daughtrey's Dept. Store (3 Calif. stores)	13.0
Eureka	
Daly's (3 Calif. stores)	4.5
Fresno	
E. Gottschalk & Co. (7 stores in Calif., incl. Fashion Fair, 14 Bobbie West stores and Village East specialty stores)	94.6
Fresno area (3 stores)	60.0
(A replacement store for the Merced unit was opened March 1983. Projected 1st year volume: $10.0 million)	
(Macy's California opened a store in the Fashion Fair Mall, Fresno, in August 1983. Planned 1st year volume: $32 million)	
Glendale	
H.S. Webb & Co. (2 Calif. stores)	5.5
(Nordstrom opened a unit in Glendale--its 5th Southern California store--in August 1983. Expected 1st year volume: $34 million)	
Huntington Park	
Windeman's Dept. Store (5 Calif. stores)	12.0
Los Angeles/Long Beach Area	
Broadway-Southern California (Carter Hawley Hale, Los Angeles, Calif.) (40 stores)	690.0
Anaheim	15.0
Bakersfield	13.0
Beverly Center (opened in March 1982)	18.5
Brea	15.5
Carlsbad	11.5
Carson	10.0
Century City	26.0
Cerritos	17.5
Chula Vista	15.5
Crenshaw	8.7
Del Amo	32.0
Downey	17.0
Fox Hills	19.0
Glendale	26.0
Grossmont	15.5
Hawthorne	11.0

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
Broadway-Southern California (continued)	
Hollywood (closed in November 1982)	$ 6.0
Huntington Beach	19.2
La Jolla	14.8
Laguna Hills	17.0
Long Beach	13.8
Los Angeles (downtown)	23.0
Montclair	15.0
Newport Beach	15.4
Northridge	24.0
Orange	17.0
Panorama City	18.5
Pasadena	14.0
Puente Hills	16.0
Riverside	12.6
San Bernardino	13.5
San Diego (5 stores)	24.0
Santa Anita	19.0
Sherman Oaks	20.7
Thousand Oaks	13.6
Topanga Plaza	17.8
Ventura	15.4
West Covina	16.4
Westchester	9.0
Whittier	10.6
(An estimated total of $8.0 million was realized in mail, phone, and warehouse volume in 1982.)	
Buffum's, Long Beach (11 junior department stores and 4 Buffum's Sportswear Shops)	109.0
Long Beach Plaza (replacement hdqtr. store)	9.0
Bullock's (Southern California)(including Bullock's Wilshire) (Federated Department Stores, Cincinnati, Ohio (26 stores)	517.9
Bullock's (excluding mail order and warehouse volume, as well as Bullock's Wilshire) (20 stores)	431.3
Beverley Center (opened Feb. 1982)	22.4
Carlsbad	10.1
Century City	24.2
Christown	10.9
Del Amo	30.6
La Habra	12.8
Lakewood	18.4
Las Vegas	14.9
Los Angeles (downtown) closed in June 1983. (Executive offices were moved to a new L.A. building in 1982. A Citicorp Plaza store will open by Fall 1986.)	16.0
Manhattan Beach (opened February 1982)	13.1
Mission Viejo	11.6

(Los Angeles/Long Beach Area continued)

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
Bullock's (continued)	
Northridge	$ 22.7
Pasadena	33.0
San Diego	22.6
Santa Ana	20.5
Scottsdale, Arizona	15.7
Sherman Oaks	45.0
South Coast Plaza	39.0
West Covina	13.3
Westwood	34.5
(Opened stores in Thousand Oaks, La Mesa and Palm Desert, Calif. in 1983. The Palm Desert store is expected to do $15 million its first year)	
Bullock's Wilshire (6 stores)	71.1
Wilshire Boulevard	29.2
Palm Springs	6.6
Woodland Hills	11.0
Newport Beach	10.8
La Jolla	7.5
Palos Verdes	6.0
Contempo Casuals (Carter Hawley Hale, Los Angeles, Calif.) (66 stores)	54.0
Harris Co., San Bernardino (5 stores)	45.0
H.C. Henshey Co., Santa Monica (2 stores)	10.0
Hinshaw's Dept. Stores, Whittier (2 stores)	25.0
Ivers Dept. Store (2 Calif. stores)	7.2
Judy's Inc., Van Nuys (74 specialty stores)	39.6
I. Magnin (Southern Division of I. Magnin & Co., San Francisco (10 specialty stores)	96.0
Beverly Hills	26.0
South Coast Plaza, Costa Mesa	17.0
May Co.-California, Los Angeles (May Dept. Stores, St. Louis, Mo.) (34 stores)	654.5
Arcadia	17.7
Brea	18.5
Buena Park	18.0
Carlsbad	16.4
Cerritos	3.0
Costa Mesa	37.5
Crenshaw	10.6
Eagle Rock	22.5
Eastland	20.6
El Cajon	13.2
Fox Hills	20.6
La Jolla	11.5
Lakewood	29.5

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
May Co. (continued)	
Laurel Plaza (To be remodeled and enlarged, will house headquarters office)	$ 29.7
Los Angeles (downtown) (Headquarters will be moved to Laurel Plaza in 1983)	30.0
Mission Viejo	15.0
Montclair	16.0
Oxnard	13.3
Palm Desert (opened Oct. 1982) Annual rate:	7.1
Palos Verdes	10.0
Pasadena	6.2
Plaza Bonita	12.5
Redondo Beach	33.5
Riverside	13.8
San Bernardino	14.6
San Diego	19.3
Sherman Oaks	14.8
The City	14.7
Thousand Oaks	17.2
Topanga Plaza, Canoga Park	25.5
Westland	27.0
Westminster	25.0
Whittier	11.8
Wilshire Boulevard	29.5
Plans are underway for a new store in Citicorp Plaza, L.A.)	
Mervyn's, Hayward (Dayton Hudson, Minneapolis, Minn.) (92 soft goods stores: Calif. 66, Ariz. 8, Utah 6, Nev. 4, Ore. 3, Tex. 3, N.M. 1, Wash. 1)	1,335.8
28 Southern Calif. stores, incl. 7 opened in 1982	250.0
Montgomery Ward (Marcor Inc., New York, N.Y.)	180.0
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (2 specialty stores)	54.5
Beverly Hills	39.5
Newport Beach	15.0
Nordstrom (Nordstrom's, Seattle, Wash.) (4 Southern Calif. stores)	123.0
South Coast Plaza, Costa Mesa	49.0
Brea	20.0
Cerritos	20.0
San Diego	34.0
J.C. Penney (24 full-line and 27 smaller stores in Southern Calif.)	617.0
J.W. Robinson (Associated Dry Goods, New York, N.Y.) (21 stores in Calif.)	415.5
Downtown Los Angeles	26.6
Anaheim	12.0
Arcadia (Santa Anita)	15.5
Beverly Hills	38.1
Cerritos	17.0
Del Amo	25.5

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
CALIFORNIA	
Los Angeles/Long Beach Area (continued)	
J.W. Robinson (continued)	
Glendale	$ 18.0
Mission Viejo	10.0
Newport Beach	29.5
Palm Springs	5.0
Panorama City (San Fernando Valley)	11.5
Pasadena	18.0
Puente Hills	18.0
San Diego (Fashion Valley)	22.0
Santa Barbara	31.0
Santa Monica	24.0
Sherman Oaks	14.0
Thousand Oaks	16.0
University Town Center	18.0
Westminster	17.5
Woodland Hills	31.3
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (5 stores in Southern Calif.)	71.0
Beverly Hills	29.0
South Coast Plaza, Costa Mesa	14.5
Woodland Hills	17.5
La Jolla and Palm Springs (2 stores)	10.0
(A 2nd San Diego branch was opened in Aug. 1982; expected volume of $12 million in 3 years)	
Sears, Roebuck (Sears, Roebuck & Co., Chicago, Ill.)	800.0
Wilson's (acquired by Melville Corp., Harrison, N.Y. in April 1982) (88 stores)	37.4
(Bonwit Teller (New York) opened a branch in Palm Desert, Palm Springs, Calif. in Oct. 1983; expected 1st year volume: $10-$15 million.)	
Marysville	
Bradley's (3 stores)	3.5
Modesto	
C.H. Dunlap (2 specialty stores in Calif. Also operates Hink's Dept. Store, Berkeley)	11.0
Pacific Grove	
Holman's Dept. Store Inc. (3 stores)	12.0
Redding	
C.M. Decker Inc. (1 store)	3.0
Sacramento	
Weinstock's (Carter Hawley Hale, Los Angeles, Calif.) (12 stores: Calif. 8, Nev. 1, Utah 3)	160.0

DEPARTMENT STORE SALES

WEST

CALIFORNIA

	Approx. Sales (Millions of $)
San Bernardino	
Harris Co. (5 Calif. stores)	$ 45.0
San Diego (also see Los Angeles listings)	
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) Fashion Valley	12.0
Nordstrom (Nordstrom Inc., Seattle, Wash.)	
Fashion Valley	34.0
(3 additional area stores to be opened in 1984/1985)	
Walker Scott (13 department and specialty stores in Southern Calif.)	45.5
(Saks Fifth Ave. opened its 2nd San Diego branch in Sept. 1983 in Mission Valley Center. Expect to reach an annual rate of $12 million in 3 years)	
San Francisco/Oakland/Palo Alto	
Bullock's-Northern California, Palo Alto (Federated Dept. Stores, Cincinnati, Ohio) (6 Calif. stores)	93.0
(This store group is to be liquidated. Nordstrom (Seattle), Carter Hawley Hale and Mervyn's (Dayton Hudson) plan to buy units. Fashion Island, San Mateo store will operate through 1983)	
Emporium Capwell (Carter Hawley Hale, Los Angeles, Calif.) (20 Calif. stores)	481.0
(Opened a store in Fairfield, Calif. in 1983)	
Hastings (Hartmarx Retail, New York, N.Y.) (15 men's specialty stores)	22.0
Liberty House, Oakland (Amfac Inc., Honolulu, Hawaii) (22 dept. stores: Hawaii 8, No. Calif. & Nev., 14)	269.0
Calif. & Nev. stores (14)	140.0
(2 stores: Hayward & Dublin, closed Jan. 1983. South Gate Mall, Sacramento & Concord are to be closed)	
Macy's California (R.H. Macy, New York, N.Y.) (21 stores: Calif. 20, Nev. 1, plus 2 Clearance Centers)	825.0
(Fashion Fair, Fresno, Calif. store opened Aug. 1983. Planned 1st year volume: $32 million. Solano and Corte Madera, Calif. stores are to open in 1984)	
I. Magnin (Federated Dept. Stores, Cincinnati, Ohio) (25 specialty stores: Calif. 18, Ariz. 1, Ore. 1, Wash. 1, Ill. 3, Md. 1)	256.3
Northern California	100.0+
Union Square, San Francisco (Major renovation completed in 1982.)	55.0
Southern Division (Los Angeles)	96.0
Joseph Magnin (Acquired by Hillman Co. and Nicholar Wallner, La Jolla) (23 specialty stores plus franchised Gucci operations)	80.0
Neiman Marcus (Neiman Marcus, Dallas, Tex.) (San Francisco store opened in Nov. 1982) (Plan $40 mil. in 1st year.)	
2-month total:	14.0

(San Francisco/Oakland/Palo Alto Area continued)

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
San Francisco/Oakland/Palo Alto (continued)	
Ross Stores Inc. (8 Calif. stores)	$ 15.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) Union Square Store	30.0
Topps & Trowsers (74 stores)	18.7
Victoria's Secret (The Limited (6 Calif. stores) (Will add 10 stores in 1983)	7.0
(Nordstrom opened its first Northern Calif. store in Oct. 1982)	
San Luis Obispo	
Riley's Dept. Store (4 Calif. stores)	7.0
San Mateo	
Levy Brothers Dept. Store (7 Calif. stores)	5.0
Santa Cruz	
Samuel Leask (3 Calif. stores)	5.0
Santa Monica	
H. C. Henshey Co. (2 Calif. stores)	10.0
Stockton	
Brown & Mahin (3 stores)	3.0
Watsonville	
Charles Ford & Co. (5 Calif. department stores and 5 specialty stores in Calif.)	18.0
Whittier	
Hinshaw's Dept. Stores Inc. (2 Calif. stores)	26.0
COLORADO	
Denver	
The Denver Dry Goods Co. (Associated Dry Goods, New York, N.Y.) (12 Colorado stores of which 5 are being renovated) (A 13th store will be opened in March 1983 in Southwest Plaza, Denver)	128.0
A.G. Eaker Co. (25 stores)	20.0
Fashion Bar (73 specialty stores)	100.0
Joslin Dry Goods, Englewood (Mercantile stores, New York, N.Y.) (7 Colo. stores) (A Southwest Denver store was opened in February 1983; a Cheyenne, Wyo. store in summer 1983)	125.0
May-D & F (May Dept. stores, Denver, Colo.) (10 Colo. stores) (Opened a Boulder, Colo. store in 1983)	135.0
Montgomery Ward (5 metropolitan area stores)	75 to 90
Neusteters (4 Colo. stores)	15 to 20
J.C. Penney (9 metropolitan area stores)	100.0

(Denver Area continued)

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
COLORADO	
Denver	
Sears Roebuck (5 metropolitan area stores)	$ 100.0+
Target (9 metropolitan area stores)	100.0
(Carter Hawley Hale plans to open 4 Broadway-Southwest stores in the metro area--2 by 1985)	
IDAHO	
Boise	
The Bazaar (2 stores)	7.0
The Mode (2 stores)	5.0
Shaver's Inc. (4 stores in Idaho)	8.5
MONTANA	
Billings	
Hart-Albin (2 dept. stores plus a men's store & a book store)	10.0
Glendive	
Anderson's Inc. (3 stores)	2.5
OREGON	
Portland	
Meier & Frank (May Department Stores, St. Louis, Mo.) (7 stores: Oregon 6, Wash. 1)	176.5
UTAH	
Salt Lake City	
ZCMI Department Store (Zion's Co-Operative Mercantile Institution) (8 stores: Utah 7, Idaho 1)	141.3
WASHINGTON	
Seattle/Everett/Spokane Area (The Northwest)	
The Bon (Allied Stores, New York, N.Y.) (35 stores plus Seattle home store: Wash. 17, Ore. 6, Id. 7, Mont. 3, Utah 3)	400.0
Seattle Met. Area (8 stores)	234.0
Northgate (largest unit)	48.0
(A Belleview Sq. unit will be opened in 1984; the 1st Wyoming unit will be opened in 1983 in Casper)	
The Crescent (Batus Inc., New York, N.Y.) (3 Spokane stores)	45.0
Eddie Bauer (General Mills) (26 stores plus mail order which generates about 40% of volume)	80.0
Downtown Seattle store	3.0
Frederick & Nelson, Seattle (Batus Inc., New York, N.Y.) (15 stores: Wash. 8, Ore. 7)	210.0
Lamont's Apparel Stores, Seattle (Pay 'n Save Corp.) (23 stores in Wash., Alaska, Ore., Id.)	108.3
Nordstrom's (Nordstrom Inc., Seattle)	
Seattle area stores (7)	198.0
Downtown	50.0

DEPARTMENT STORE VOLUME LEADERS

Following is a compilation of leading department stores, listed by buying or divisional headquarter location, and showing the best available information on sales for the year 1982 (or closest fiscal period) attributed to each headquarter operation. The volume figures cover sales of all stores (confined to department stores where possible) operated by the listed store. Not included in this list are national chains, such as Sears, Ward and Penney, promotional chains, such as K mart and national chain department stores without divisional buying operations. (See section on MAJOR NATIONAL/REGIONAL CHAINS)

STORES WITH TOTAL SALES OF $100 MILLION OR MORE

	Sales Volume (Millions of $)
Macy's New York, New York, N.Y. (R.H. Macy) (16 stores plus furniture clearance and auto centers) Fiscal year ending July 1983:	$ 1,043.0
Bamberger's, Newark, N.J. (R.H. Macy) (23 stores plus furniture clearance and auto centers)	975.0
Macy's California, San Francisco, Calif. (R.H. Macy) (21 stores)	825.0
Broadway Southern California, Los Angeles, Calif. (Carter Hawley Hale) (40 stores)	690.0
J. L. Hudson, Detroit, Mich. (Dayton-Hudson) (20 stores)	683.8
Bloomingdale's, New York, N.Y. (Federated) (12 full-line department stores)	680.5
May Company-California, Los Angeles, Calif. (May Department Stores) (34 stores)	654.5
Abraham & Straus, Brooklyn, N.Y. (Federated) (15 stores)	650.5
Marshall Field, Chicago, Ill. (Batus Inc.)(20 stores)	605.0
Foley's, Houston, Tex. (Federated) (14 stores)	597.7
Burdine's, Miami, Fla. (Federated) (23 stores)	582.8
Lord & Taylor, New York, N.Y. (Associated Dry Goods) (38 stores)	558.0+
Bullock's Southern California, Los Angeles, Calif. (Federated) (26 stores)	517.9
Alexander's Inc., New York, N.Y. (Alexander's Dept. Stores Inc.)(16 stores)	511.4
Emporium Capwell, San Francisco, Calif. (Carter Hawley Hale) (20 stores)	481.0
Dayton's Department Store, Minneapolis, Minn. (Dayton Hudson) (13 stores plus 3 homefurnishings stores)	437.3
Bullock's, Los Angeles, Calif. (Federated) (20 stores not including Bullock's Wilshire)	431.3

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION OR MORE (continued)

	Sales Volume (Millions of $)
Rich's Inc., Atlanta, Ga. (Federated) (16 stores)	$ 430.1
Gimbel's East, Gimbel's New York and Gimbel's Philadelphia combined, New York, N.Y. (Batus Inc.) (20 stores)	417.0
Hecht's, Washington, D.C. (May Department Stores Co.) (24 stores)	415.6
J.W. Robinson Co., Los Angeles, Calif. (Associated Dry Goods)(21 stores)	415.5
Jordan Marsh Co., Boston, Mass. (Allied Stores) (14 stores)	410.0
The Bon, Seattle, Wash. (Allied Stores) (35 stores plus Seattle home store)	400.0
F & R Lazarus, Columbus, Ohio (Federated) (17 stores)	389.3
Filene's, Boston, Mass. (Federated) (14 department stores, 8 basement stores)	372.8
Famous Barr, St. Louis, Mo. (May Department Stores) (15 stores)	363.5
Woodward & Lothrop Inc., Washington, D.C. (16 stores)	357.5
John Wanamaker, Philadelphia, Pa. (Carter Hawley Hale) (16 stores)	350.0
Shillito Rikes, Cincinnati, Ohio (Federated) (14 stores)	342.9
Sanger Harris, Dallas, Tex. (Federated) (14 stores)	329.2
B. Altman, New York, N.Y. (The Altman Foundation) (7 stores)	329.0
Carson Pirie Scott & Co., Chicago, Ill. (24 stores)	323.4
Stern's/Gertz, Paramus, N.Y. (Allied Stores) (16 stores)	310.0
Dillard Dept. Stores-Central Division, Fort Worth, Tex. (Dillard Dept. Stores, Little Rock, Ark.) (26 stores)	300.0
Strawbridge & Clothier, Philadelphia, Pa. (Allied Stores) (12 stores not including Clover Stores)	290.0
Maas Bros., Tampa, Fla. (Allied Stores)(20 stores)	270.0
Liberty House of Calif., Oakland, Calif. (Amfac) (22 stores)	269.1
Kaufmann's, Pittsburgh, Pa. (May Department Stores) (10 stores)	268.6
C.J. Gayfer Co., Mobile, Ala. (Mercantile Stores) (12 stores)	250.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION OR MORE (continued)

	Sales Volume (Millions of $)
Davison's, Atlanta, Ga. (R.H. Macy) (13 stores)	$ 250.0
D. H. Holmes Co. Ltd., New Orleans, La. (15 stores)	240.7
Jordan Marsh-Florida, Miami, Fla. (Allied Stores) (14 stores)	240.0
McAlpin Co., Cincinnati, Ohio (Mercantile Stores) (9 stores)	240.0
Hess's Inc., Allentown, Pa. (Crown American Corp.) (29 stores)	239.6
The Higbee Co., Cleveland, Ohio (11 stores)	215.2
Frederick & Nelson, Seattle, Wash. (Batus Inc.) (15 stores)	210.0
Dillard's Little Rock Division, Little Rock, Ark. (18 stores)	208.0
Thalhimer Bros. Inc., Richmond, Va. (25 stores)	206.0
Dillard's San Antonio Division, San Antonio, Texas (Dillard Department Stores) (21 stores)	203.0
Macy's Midwest, Kansas City, Mo. (R.H. Macy) (19 stores)	200.0
L. S. Ayres & Co., Indianapolis, Ind. (Associated Dry Goods) (13 stores)	200.0
Elder Beerman Department Store Div., Dayton, Ohio (21 stores)	200.0
The May Co., Cleveland, Ohio (May Department Stores) (10 stores)	189.0
P. A. Bergner, Peoria, Ill. (25 stores)	186.0
Jacobson Stores, Jackson, Mich. (17 stores)	181.3
Wieboldt Stores, Chicago, Ill. (14 stores)	179.1
Meier & Frank, Portland, Ore. (May Dept. Stores) (7 stores)	176.5
Gimbels Midwest, Milwaukee, Wis. (11 stores)	171.0
J. Byron's, Miami, Fla. (Jack Eckerd Corp.) (45 stores)	168.4
Younker Bros. Inc., Des Moines, Iowa (Equitable of Iowa) (29 stores)	166.6
Boscov's Dept. Stores, Reading, Pa. (9 stores)	165.0
Joseph Horne, Pittsburgh, Pa. (Associated Dry Goods) (13 stores plus 2 Boston Stores)	165.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION OR MORE (continued)

	Sales Volume (Millions of $)
Weinstock's, Sacramento, Calif. (Carter Hawley Hale) (12 stores)	$ 160.0
Sibley Lindsay & Curr Co., Rochester, N.Y. (Associated Dry Goods) (15 stores)	160.0
Goudchaux/Maison Blanche (Goudchaux's Inc.) Baton Rouge, La. (6 stores)	155.8
G. Fox & Co., Hartford, Conn. (May Dept. Stores) (8 stores)	152.6
The Jones Co., Kansas City, Mo. (Mercantile Stores) (7 stores)	150.0
Gimbels, Pittsburgh, Pa. (Batus Inc.) (7 stores)	148.0
Diamond's, Tempe, Ariz. (Dayton-Hudson) (13 stores)	143.0
ZCMI, Salt Lake City, Utah (8 stores)	141.3
The M. O'Neil Co., Akron, Ohio (May Dept. Stores) (10 stores)	140.1
Castner Knott Dry Goods Co., Nashville, Tenn. (Mercantile Stores) (10 stores)	140.0
Kohl's Department Stores, Brookfield, Wis. (Batus Inc.) (25 stores)	140.0
Stix, Baer & Fuller, St. Louis, Mo. (Associated Dry Goods) (12 stores)	139.4
May-D & F, Denver, Colo. (May Dept. stores) (10 stores)	135.0
Goldsmith's, Memphis, Tenn. (Federated) (6 stores)	130.8
Glosser Bros., Johnstown, Pa. (1 store)	130.0
Denver Dry Goods Co., Denver, Colo. (Associated Dry Goods) (12 stores)	128.0
Joske's, Houston, Tex. (Allied Stores) (10 stores)	125.0
Joslin Dry Goods, Englewood, Colo. (Mercantile Stores) (7 stores)	125.0
McRae's, Jackson, Miss. (13 stores)	124.4
Broadway-Southwest Div., Mesa, Ariz. (Carter Hawley Hale) (10 stores)	120.0
Boston Store, Milwaukee, Wis. (Federated) (8 stores)	117.9
Gayfers, Montgomery, Ala. (Mercantile Stores) (6 stores)	115.0
Joske's-Dallas/Phoenix, Dallas, Tex. (Allied Stores) (12 stores)	112.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION OR MORE (continued)

	Sales Volume (Millions of $)
Miller & Rhoads Inc., Richmond, Va. (Allied Stores) (22 stores)	$ 110.0
Howland Steinbach, White Plains, New York (Supermarkets General) (28 stores)	110.0
Buffum's, Long Beach, Calif. (15 stores incl. 11 junior department stores)	109.0
Prange's, Green Bay & Sheboygan, Wis. (19 stores)	107.0
Hahne & Co., Newark, N.J. (Associated Dry Goods) (8 stores)	105.0
Iveys-Carolinas, Charlotte, N.C. (Batus Inc.) (14 stores)	105.0
Strouss, Youngstown, Ohio (May Department Stores) (10 stores)	100.5
Donaldson's, Minneapolis-St. Paul, Minn. (Allied Stores) (9 stores)	100.0
J. B. White, Augusta, Ga. (Mercantile Stores) (4 stores)	100.0

STORES WITH SALES OF $50-TO-$99 MILLION

May's, Brooklyn, New York (J. W. Mays Inc.) (4 stores)	98.0
Adam, Meldrum & Anderson, Buffalo, N.Y. (10 stores)	97.0
J. Bacon & Co., Louisville, Ky. (Mercantile Stores) (6 stores)	95.0
J. L. Brandeis & Sons, Omaha, Neb. (10 stores)	95.0
E. Gottschalk, Fresno, Calif. (7 stores)	94.6
Bullock's-Northern Calif., Palo Alto, Calif. (Federated) (6 stores)	93.0
Goldwaters, Scottsdale, Ariz. (Associated Dry Goods) (9 stores)	91.0
John A. Brown Co., Oklahoma City, Okla. (Dayton Hudson) (6 stores)	86.1
Iveys' Florida, Winter Park, Fla. (Batus Inc.) (10 stores)	85.0
Joske's, San Antonio, Tex. (Allied Stores) (8 stores)	85.0
McCurdy & Co., Rochester, N.Y. (6 stores)	85.0
Pizitz, Birmingham, Ala. (11 stores)	82.5

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $50-TO-$99 MILLION (continued)

	Sales Volume (Millions of $)
Wm. H. Block & Co., Indianapolis, Ind. (Allied Stores) (9 stores)	$ 80.0
The Lion Dry Goods Co., Toledo, Ohio (Mercantile Stores) (3 department stores and 2 specialty stores)	80.0
Millers Inc., Knoxville, Tenn. (Allied Stores) (11 stores)	80.0
Robinson's of Florida, Winter Park, Fla. (Associated Dry Goods) (7 stores)	80.0
Crowley Milner & Co., Detroit, Mich. (10 stores)	76.4
Hochschild Kohn Inc., Baltimore, Md. (Supermarkets General) (10 stores)	75.9
Hutzler's, Baltimore, Md. (8 stores)	75.0
Stone & Thomas, Wheeling, W. Va. (14 stores)	75.0
H. & S. Pogue, Cincinnati, Ohio (Associated Dry Goods) (5 stores)	72.0
D. M. Read Inc., Bridgeport, Conn. (Allied Stores) (5 stores)	72.0
Pomeroys Inc., Levittown, Pa. (Allied Stores) (9 stores)	70.0
Stewart Dry Goods, Louisville, Ky. (Associated Dry Goods) (7 stores)	66.0
W. S. Peebles & Co., Lawrenceville, Va. (43 stores)	65.0
Stewart & Co., Baltimore, Md. (Caldor Div., Associated Dry Goods) (5 stores)	60.0
West Bros., De Ridder, La. (24 stores)	59.0
May-Cohens, Jacksonville, Fla. (May Dept. Stores) (6 stores)	57.9
Sage Allen, Hartford, Conn. (13 stores)	57.0
Pomeroy's, Harrisburg, Pa. (Allied Stores) (6 stores)	55.0+
United Dept. Stores, Trenton, N.J. (15 stores)	50.0
Cain-Sloan, Nashville, Tenn. (Allied Stores) (4 stores)	50.0
Albert-Steiger Inc., Springfield, Mass. (9 stores)	50.0
S. Grumbacker & Sons, York, Pa. (14 stores)	50.0

MAJOR NATIONAL/REGIONAL CHAINS

The following companies have major positions in general merchandise/apparel retailing--including the operation of traditional department stores, discount stores, apparel specialty stores and catalog operations. Many of these chains are also engaged in non-related activities, including the operation of supermarkets or of specialized hard goods outlets, manufacturing, wholesaling or diverse activities such as the operation of auto repair shops, television stations, etc. The sales volumes reported are total net sales covering all operations unless otherwise noted, and are for the latest fiscal period or period reflecting 1982 volume.

Retail Chain	Sales (Millions of $)
Alexander's, Inc., New York, N.Y. (Volume adjusted for 1982 fiscal year)	$ 511.3
Allied Stores Corp., New York, N.Y.	3,215.6
Almy Stores Inc., Boston, Mass. (Also operates R.H. White's, Worcester, Mass.)	80.0
Ames Department Stores Inc., Rocky Hill, Conn. (To be merged with KDT Industries which operates 25 units, had a volume of $160 million in 1982)	422.8
C.R. Anthony & Co., Oklahoma City, Okla.	396.0
Associated Dry Goods Corp., New York, N.Y. (Includes 79 Caldor units with a volume of $925 million; 173 department stores, 64 Sycamore apparel units with a volume totaling $2.3 billion)	3,188.8
Batus Inc., Retail Divisions, New York, N.Y. (Acquired Marshall Field and J.B. Ivey in 1982) Vol. for full year, excluding supermarkets	2,410.0
L.L. Bean, Freeport, Me.	225.0
Belk Stores, Charlotte, N.C.	Approx. 1,500.0
Bradlees, Braintree, Mass. (The Stop & Shop Companies)	871.6
Brooks Fashion Stores Inc., New York, N.Y.	211.5
Brown Group Inc., St. Louis, Mo.	Specialty retailing: 278.1
Burlington Coat Factory, Burlington, N.J.	130.5
J. Byron's (Jack Eckerd Corp.), Clearwater, Fla.	168.4
Carson Pirie Scott & Co., Chicago, Ill. (Sales of department store division: $323.4 million)	797.6
Carter Hawley Hale Stores, Inc., Los Angeles, Calif. (Department store division sales: $2.0 billion; specialty stores, $1.0 billion; including Contempo Casuals with sales totaling $54 million)	3,054.8
Charming Shoppes, Inc., Bensalem, Pa.	174.3
Danners, Inc. (Three-D), Indianapolis, Ind.	163.2
Dayton Hudson Corp., Minneapolis, Minn. (Includes sales of Mervyn's, Hayward, Calif., $1.3 billion; of the department store division, $1.35 billion; Target Stores, $2.4 billion; specialty stores, $0.6 billion)	5,660.7
Dillard Department Stores, Inc., Little Rock, Ark. (Including three department store divisions: Central Division, Texas-New Mexico Division, Little Rock Division)	711.3
Dollar General Corp., Scottsville, Ky.	290.1
Duckwall-ALCO Stores Inc., Abilene, Kans.	216.3
The Dunlap Co., Fort Worth, Tex.	100.0

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	Sales (Millions of $)
Eddie Bauer, Inc., Redmond, Wash. (General Mills)	$ 80.0
Edison Bros. Stores, Inc., St. Louis, Mo. (Specialty store division sales: $224.4 million)	915.9
Elder Beerman Stores Corp., Dayton, Ohio (Department store division: $200 million)	262.5
Evans Inc., Chicago, Ill. (112 specialty stores and leased departments)	109.8
Family Dollar Stores Inc., Charlotte, N.C.	207.4
Federated Department Stores Inc., Cincinnati, Ohio (Excluding supermarket sales) (Department store division sales: $5.6 billion) (A promotional popular-price soft goods chain is to be opened in 1984)	6,423.2
Frederick's of Hollywood, Hollywood Calif.	41.5
Gap Stores Inc., San Bruno, Calif.	444.9
Gaylords National Corp., Secaucus, N.J.	114.5
Glosser Brothers, Inc., Johnstown, Pa.	223.7
W. R. Grace & Co., New York, N.Y. (Apparel specialty store sales)	134.0
HRT Industries, Los Angeles, Calif. (Filed Chapter 11 in Nov. 1982)	443.6
Hart Schaffner & Marx, Chicago, Ill. (Hartmarx retail stores division)	456.0
Heck's Inc., Charleston, W.Va. (Discount department and shoe stores)	399.3
D.H. Holmes, New Orleans, La. (department stores plus car care centers, shoe stores)	240.7
Howland-Steinbach/Hochschild, Kohn, Woodbridge, N.H. (Supermarkets General)	185.0
Interco Inc., St. Louis, Mo. (General merchandise store division sales, including P.N. Hirsch, St. Louis: $196 million)	685.7
Jacobson Stores Inc., Jackson, Mich.	181.3
Jamesway Corp., Secaucus, N.J.	336.8
K mart Corp., Troy, Mich.	16,772.2
Lamont's Apparel Stores (Pic 'n Save Corp), Los Angeles, Calif.	108.3
M.H. Lamston Inc., New York, N.Y.	44.7
The Limited Stores, Inc., Columbus, Ohio (Including Lane Bryant, New York, N.Y.) with a volume of about $300 million; not including Victoria's Secret, San Francisco, which is expected to reach $15 million in fiscal 1983. Both operations were acquired in 1982)	721.4
Loehmann's, New York, N.Y. (Acquired by Associated Dry Goods in 1983)	260.0
R.H. Macy & Co. Inc., New York, N.Y. (Fiscal year ending January 1983)	3,219.4
Marshall Field & Co., Chicago, Ill. (Acquired Batus Inc., in 1982) Retail Div. incl. Breuners	868.5
May Department Stores, St. Louis, Mo. (Department store division sales: $2,654.6 million).	3,670.4
Melville Corp., Harrison, N.Y. (Apparel specialty stores, including Foxmoor Casuals, Brickton, Mass., $179.2 million; Chess King, Worcester, Mass. men's wear stores, $152.5 million; Marshall's $829.9 million, Wilson's House of Leather & Suede, Los Angeles, $37.4 million)	1,161.6

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	Sales (Millions of $)
Mercantile Stores Co., Wilmington, Del.	$ 1,428.4
Miller-Wohl Co., Secaucus, N.J.	222.4
Montgomery Ward, Chicago, Ill. (Marcor, Inc.) (Sales of Jefferson Ward Stores: $565 million)	6,143.0
G.C. Murphy Co., McKeesport, Pa.	822.3
National Shirt Shops, New York, N.Y.	63.0
New Process Co., Warren, Pa.	235.4
S. E. Nichols Inc., New York, N.Y.	262.0
Nordstrom Inc., Seattle, Wash.	612.9
Oshman's Sporting Goods, Inc., Houston, Tex.	247.3
Paul Harris, Indianapolis, Ind.	90.4
J.C. Penney Co., Inc., New York, N.Y. (Consolidated continuing operations only)	11,414.0
Petrie Stores Corp., Secaucus, N.J.	566.7
Phillips-Van Heusen Corp., New York, N.Y. (Apparel specialty store sales)	101.4
H.C. Prange Co., Sheboygan, Wis. (Including PrangeWay Discount Store sales)	221.8
Rapid American, New York, N.Y. (Including Lerner's $790 million; McCrory and Britts Division)	2,570.7
Rose's Stores Inc., Henderson, N.C.	661.9
Salkin & Linoff Inc., Minneapolis, Minn.	85.0
Schottenstein's Stores Corp., Columbus, Ohio	129.0
SCOA Industries, Inc., Hills Department Stores, Canton, Mass.	900.0
Sears, Roebuck & Co., Inc., Chicago, Ill. (U.S. merchandising operations only)	18,778.8
Sprouse-Reitz Co., Inc., Portland, Ore.	150.5
Sterling Stores Co., Little Rock, Ark. -- 1981 volume:	130.7
Strawbridge & Clothier, Philadelphia, Pa. (Including sales of Clover Stores estimated at $160 million)	472.3
Super Valu Stores Inc., Minneapolis, Minn. (Includes ShopKo Stores, Green Bay, Wis., volume $389.5 million; County Seat, Eden Prairie, Minn., $192 million)	581.5
U.S. Shoe Corp., Cincinnati, Ohio--Apparel specialty retailing division sales:	583.2
Wal-Mart Stores Inc., Bentonville, Ark.	3,376.2
Wickes Companies, Inc., San Diego, Calif. (Including General & Apparel Retailing Sales: $1,508 million)	2,671.5
Winkelman Stores Inc., Detroit, Mich.	99.2
Winn's Stores Inc., San Antonio, Tex.	149.4
F.W. Woolworth Co., New York, N.Y. (U.S. Woolworth, $1,707 million; apparel specialty store division, $272.6 million incl. Richman Bros., Cleveland, which had a volume of $198.0 mil.) (Acquired Holtzman's Little Folk Shop, Calif., which had 1982 volume of about $41 million)	5,124.0
Younkers, Des Moines, Iowa (Equitable of Iowa Companies, Des Moines, Iowa)	166.6
Zayre Corp., Framingham, Mass.	2,139.6

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Stores
Allied Stores Corporation	New York, N.Y.
Ann Taylor	New York, N.Y.
Block's (William H. Block & Co.)	Indianapolis, Ind.
The Bon (Bon Marche)	Seattle, Wash.
Bonwit Teller	New York, N.Y.
Brooks Bros.	New York, N.Y.
Cain-Sloan	Nashville, Tenn.
Catherine's Stout Shoppe (Plus Size)	Memphis, Tenn.
Deys	Syracuse, N.Y.
Donaldson's	Minneapolis, Mn.
Garfinckel's	Washington, D.C.
Harzfelds	Kansas City, Mo.
Heer's	Springfield, Mo.
Herp's	Muskegon, Mich.
Jordan Marsh-New England	Boston, Mass.
Jordan Marsh-Florida	Miami, Fla.
Joske's	Dallas, San Antonio and Houston, Tex.
Levy's	Savannah, Ga.
Maas Brothers	Tampa, Fla.
Miller & Rhoads	Richmond, Va.
Miller's	Knoxville, Tenn.
Muller's	Lake Charles, La.
Plymouth	New York, N.Y.
Pomeroy's	Harrisburg and Levittown, Pa.
Read's	Bridgeport, Conn.
Stern's/Gertz	Paramus, N.J.
Troutman's (A.E. Troutman Co.)	Greensburg, Pa.
Wren's (Edward Wren Store)	Springfield, Ohio
Almy Stores, Inc.	Brighton, Mass.
Almy's	Brighton, Mass.
Edgar's	Fall River, Mass.
Edwards	Greece and Pittsford, N.Y.
Freese's	Bangor, Maine
Gorin's	Brighton, Mass.
Star Store	New Bedford, Mass.
R.H. White	Worcester, Mass.
Witherill	Camillus, N.Y.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Associated Dry Goods	New York, N.Y.
L.S. Ayres & Co.	Indianapolis, Ind.
Caldor, Inc.	Norwalk, Conn.
The Denver Dry Goods Co.	Denver, Colo.
The Diamond (Sold in March 1983)	Charleston, W.Va.
Goldwater's	Scottsdale, Ariz.
Hahne & Co.	Newark, N.J.
Joseph Horne Co.	Pittsburgh, Pa.
Lord & Taylor	New York, N.Y.
The H & S Pogue Co.	Cincinnati, Ohio
Powers Dry Goods Co.	Minneapolis, Minn.
J.W. Robinson Co.	Los Angeles, Calif.
Robinson's of Florida	St. Petersburg, Fla.
Sibley, Lindsay & Curr Co.	Rochester, N.Y.
Stewart & Co. (merged with Caldor's in 1982)	Baltimore, Md.
The Stewart Dry Goods Co.	Louisville, Ky.
Stix, Baer & Fuller	St. Louis, Mo.
Sycamore Specialty Stores	Indianapolis, Ind.
(Acquired Loehmann's in 1983.)	
Batus, Inc. (Batus Retail Group)	New York, N.Y.
The Crescent	Spokane, Wash.
Frederick & Nelson	Seattle, Wash.
Gimbels-East	New York, N.Y.
Gimbels-Midwest	Milwaukee, Wis.
Gimbels-Pittsburgh	Pittsburgh, Pa.
Ivey's-Carolinas	Charlotte, N.C.
Ivey's-Florida	Orlando, Fla.
Kohl's Department Stores	Brookfield, Wis.
Marshall Field & Co.	Chicago, Ill.
Saks Fifth Avenue	New York, N.Y.
Thimbles	Chicago, Ill.
Carter Hawley Hale Stores, Inc.	Los Angeles, Calif.
Bergdorf Goodman Co.	New York, N.Y.
The Broadway-Southern California	Los Angeles, Calif.
The Broadway-Southwest	Phoenix, Ariz.
Contempo Casuals	Los Angeles, Calif.
Emporium Capwell	San Francisco, Calif.
Neiman-Marcus	Dallas, Tex.
Thalhimers	Richmond, Va.
John Wanamaker	Philadelphia, Pa.
Weinstock's	Sacramento, Calif.

(Also operates Holt, Renfrew, headquartered in Montreal, Canada.)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
CML	Acton, Mass.
Britches of Georgetown	Washington, D.C.
Carroll Reed	Boston, Mass.
Golup's	Minneapolis, Minn.
Country Store of Concord	Concord, N.H.
Dayton Hudson Corp.	Minneapolis, Minn.
John A. Brown	Oklahoma City, Okla.
Dayton's	Minneapolis, Minn.
Diamond's	Phoenix, Ariz.
Hudson's (J.L. Hudson Co.)	Detroit, Mich.
Mervyn's	Hayward, Calif.
Plum's (opened in March 1983)	Los Angeles, Calif.
Edison Brothers Stores, Inc.	St. Louis, Mo.
Fashion Conspiracy	San Diego, Calif.
Jeans West/Oak Tree	St. Louis, Mo.
Size 5-7-9 Shops	St. Louis, Mo.
Elder Beerman Stores Corp.	Dayton, Ohio
Elder Beerman Dept. Stores	Dayton, Ohio
Margo's	Dallas, Texas
Spare Change (acquired in April 1982)	Dayton, Ohio
Federated Department Stores, Inc.	Cincinnati, Ohio
Abraham & Straus	Brooklyn, N.Y.
Bloomingdale's	New York, N.Y.
Boston Store	Milwaukee, Wis.
Bullock's	Los Angeles, Calif.
Bullock's Northern California (to be liquidated in 1983)	Palo Alto, Calif.
Burdine's	Miami, Fla.
The Children's Place (acquired March 1982)	Pine Brook, N.J.
Filene's (including basement stores)	Boston, Mass.
Foley's	Houston, Texas
Goldsmith's	Memphis, Tenn.
Lazarus	Columbus, Ohio
I. Magnin	San Francisco, Calif.
Rich's	Atlanta, Ga.
Sanger-Harris	Dallas, Texas
(including Levy's, Tuscon, Ariz. as of April 1982)	Dallas, Texas
Shillito's/Rike's (operation combined in April 1982)	Cincinnati, Ohio

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
General Mills, Inc.	Minneapolis, Minn.
Eddie Bauer	Redmond, Wash.
The Talbots, Inc.	Hingham, Mass.
Wild West (acquired in 1982)	Costa Mesa, Calif.
W.R. Grace	New York, N.Y.
Berman's	Brooklyn Park, Minn.
Shepler's	Wichita, Kansas
Hart Schaffner & Marx (Hartmarx Retail)	Chicago, Ill.
Baskin Clothing Co.	Chicago, Ill.
Ray Beers	Topeka, Kansas
Blackburn's	Amarillo, Texas
Capper & Capper, Ltd.	Detroit, Mich. and Chicago, Ill.
Country Miss Stores	New York, N.Y.
deJong's	Evansville, Ind.
Field Brothers	New York, N.Y.
Arthur Frank	Salt Lake City, Utah
Frank Bros.	San Antonio, Texas
Hanny's	Phoenix, Ariz.
Hasting's	San Francisco, Calif.
Jack Henry	Kansas City, Mo.
Heyward-Mahon	Greenville, S.C.
J. O. Jones	Charlotte, N.C.
Kleinhans	Buffalo, N.Y.
Klopfenstein's	Seattle, Wash.
Kuppenheimer's (acquired December 1982)	Atlanta, Ga.
Leopold Price & Rolle	Houston, Texas
Levy-Wolf	Jacksonville, Fla.
Liemandt	Minneapolis, Minn.
Littler's	Seattle, Wash.
Merritt Schafer & Brown	Austin, Texas
National Clothing	St. Louis, Mo.
Polo Shop	Seattle, Wash.
Porter-Stevens	New Orleans, La.
Root's	Red Bank, N.J.
Shulman's	Hampton, Va.
Silverwoods	Los Angeles, Calif., Las Vegas, Nev.
Stevens	Jackson, Miss.
Chas. A. Stevens	Chicago, Ill.
F. R. Tripler & Co.	New York, N.Y.
Walkers	Columbus and Dayton, Ohio
Wallachs	New York, N.Y.
Wallachs of Florida	Miami, Fla.
Jas. K. Wilson	Dallas, Tex.
Wolf Bros.	Tampa, Fla.
Zachry	Atlanta, Ga.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS (continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Interco, Inc.	St. Louis, Mo.
Alberts	Detroit, Mich.
Fine's Men's Shops, Inc.	Norfolk, Va.
Golde's Department Stores	St. Louis, Mo.
P.N. Hirsch & Co. (275 out of 350 units are to be sold to Dollar General Corp.)	St. Louis, Mo.
Standard Sportswear, Inc.	Pittsburgh, Pa.
United Shirt Distributors, Inc.	Detroit, Mich.
Limited Stores Co. (The Limited)	Columbus, Ohio
Lane Bryant (acquired in May 1982)	New York, N.Y.
The Limited/Limited Express	Columbus, Ohio
Roaman's (acquired in November 1982)	New York, N.Y.
Sizes Unlimited (opened January 1983)/ Smart Size	New York, N.Y.
Victoria's Secret (acquired in July 1982)	San Francisco, Calif.
R.H. Macy & Co., Inc.	New York, N.Y.
Bamberger's	Newark, N.J.
Davison's	Atlanta, Ga.
Macy's California	San Francisco, Calif.
Macy's Midwest	Kansas City, Mo.
Macy's New York	New York, N.Y.
Manhattan Industries, Inc.	New York, N.Y.
Brand Name Fashion Outlet	Glen Rock, N.J.
Frost Brothers, Inc.	San Antonio, Tex.
Manhattan Ward, Inc.	Conshohocken, Pa.
The May Department Stores Co.	St. Louis, Mo.
Famous-Barr Co.	St. Louis. Mo.
G. Fox & Co.	Hartford, Conn.
The Hecht Co.	Washington D.C. and Baltimore, Md.
Kaufmann's	Pittsburgh, Pa.
May-Cohens	Jacksonville, Fla.
The May Co.	Cleveland, Ohio
May Co. California	Los Angeles and San Diego, Calif.
May-D & F	Denver, Colo.
Meier & Frank Co.	Portland, Ore.
The M. O'Neil Co.	Akron, Ohio
Stouss	Youngstown, Ohio
Melville Corp.	Harrison, N.Y.
Chess King	Worcester, Mass.
Foxmoor	West Bridgewater, Mass.
Marshall, Inc.	Woburn, Mass.
Wilson's (acquired in April 1982)	Los Angeles, Calif.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Mercantile Stores Co., Inc.	Wilmington, Del.
Bacon's	Louisville, Ky.
Castner-Knott Co.	Nashville, Tenn.
de Landrecies	Fargo, N.D.
Gayfer's/Montgomery Fair	Montgomery, Ala.
C.J. Gayfer & Co.	Mobile, Ala.
Glass Block	Duluth, Minn.
Hennessey's	Billings, Mont.
The Jones Store Co.	Kansas City, Mo.
Joslin's	Denver, Colo.
Lion	Toledo, Ohio
McAlpin's	Cincinnati, Ohio & Lexington, Ky.
The People's Store	Tacoma, Wash.
Root's (combined with Bacon's in 1982)	Terre Haute, Ind.
J.B. White	Augusta, Ga. & Columbia, S.C.
The Miller-Wohl Co., Inc.	Secaucus, N.J.
Anita's (opened November 1983)	Secaucus, N.J.
Lizzie B	Secaucus, N.J.
Jean Nicole	Secaucus, N.J.
Three Sisters	Secaucus, N.J.
Petrie Stores Corp.	Secaucus, N.J.
David's	Secaucus, N.J.
Franklin's	Secaucus, N.J.
G & G Shops	New York, N.Y.
Hartfield's	Secaucus, N.J.
Marianne	Secaucus, N.J.
Petrie's	Secaucus, N.J.
The Ranch (acquired in July 1982)	Secaucus, N.J.
Stuarts	Secaucus, N.J.
Phillips-Van Heusen Corp.	New York, N.Y.
Hamburger's	Baltimore, Md.
Harris & Frank	Los Angeles, Calif.
Juster's	Minneapolis, Minn.
Kennedy's	Boston, Mass.
Rices Nachmans	Norfolk, Va.
Rapid-American Corp.	New York, N.Y.
Britts Dept. Store Division (closed in 1982)	New York, N.Y.
Lerner Stores Corp.	New York, N.Y.
McCrory Stores Division	New York, N.Y.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Supermarkets General Corp.	Woodbridge, N.J.
Hochschild, Kohn & Co.	Baltimore, Md.
Howland-Steinbach	White Plains, N.Y. & Asbury Park, N.J.
U.S. Shoe Corp.	Cincinnati, Ohio
Antics/Ups 'N Downs	Enfield, Conn.
August Max	New York, N.Y.
Caren Charles	Enfield, Conn.
Casual Corner	Enfield, Conn.
T. H. Mandy	Merrfield, Va.
The Proving Ground	Enfield, Conn.
J. Riggings	Atlanta, Ga.
United Department Stores, Inc.	Trenton, N.J.
S.P. Dunham & Co.	Trenton, N.J.
The following were closed in 1982:	
Denby Stores	Menands, N.Y.
The Outlet Dept. Stores	Providence, R.I.
Sattler's	Buffalo, N.Y.
Wickes Companies, Inc.	San Diego, Calif.
Gamble Dept. Stores (Sold in 1982)	Chicago, Ill.
Howard Brothers	Monroe, La.
J.M. McDonald (sold in 1982)	Hastings, Neb.
Mode O'Day	Burbank, Calif.
Women's World Shops	La Mesa, Calif.
F. W. Woolworth	New York, N.Y.
Anderson, Little	Fall River, Mass.
J. Brannam	New York, N.Y.
Richman Brothers	Cleveland, Ohio
Susie's Casuals	New York, N.Y.
Woolworth's	New York, N.Y.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Consumer Market Developments

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CONSUMER MARKET DEVELOPMENTS

Current Trends

The unexpectedly strong recovery beginning in March 1983 from the severe recession of 1981-82 was led by the consumer. Spending really spurted in the Christmas season, ending the year on a very strong note for retailers, with depleted stocks ready for refurbishing in 1984.

Consumer spending for all nondurable goods, including apparel and accessories, rose 1% in November 1983 to a seasonally adjusted annual rate of $833.2 billion. The rise in October was 0.9%; in September, 0.5%. Spending for durable goods climbed 1.8% in November to an adjusted annual rate of $295.6 billion, following the 2.5% gain reported for October 1983.

There were some warning signs, however. While the nation's upbeat consumers spent heavily at the close of 1983, their personal income grew more slowly than it had in the previous several months, according to the Department of Commerce. In November, overall consumer spending was up 1.1%. Personal income, however, rose only 0.7% in that month. The gap in the rate of gain in spending versus incomes cannot be sustained, and this is considered by analysts to be an indication that consumer spending, and the economy as a whole, may slow down in coming months.

The GNP grew at an annual rate of 4.5% in the final quarter of 1983, well below the 6% to 7% rate predicted by government and private economists. Deterioration of the nation's trade balance has been cited as the primary reason for the slower-than-expected growth.

With increased employment, there had been expectations that personal incomes would rise at a faster rate; however, employment gains were offset by a decline in the average number of hours worked each week and by a small drop in hourly earnings. Department of Commerce figures for November (which are subject to revision) showed that private wages and salaries grew only 0.2% in November.

Some analysts believe consumption growth will slow down from an 8% rate in the fourth quarter (bringing the total to $2,150 billion in 1983) to 4% for next year as a whole.

Because spending growth outstripped incomes, personal savings in November 1983 fell to a seasonally adjusted annual rate of $118.9 billion, down from $125.7 billion in October. If personal savings continue at the low November rate, many analysts fear that competition for savings funds--the pool needed to finance federal budget deficits as well as business investment--will push up interest rates next year. The consumer spending spurt might also trigger action on the part of the Federal Reserve Board to tighten the money supply, which would also drive up rates.

The trend in interest rates is, of course, a key element in consumer market developments. After two months of declines, housing starts rose 6.4% in November, and the year 1983 is expected to be the best since 1979, with starts totaling 1.7 million units. Some of this spurt in new home constructions can be traced to fears that interest rates will move higher next year.

CONSUMER MARKET DEVELOPMENTS

Current Trends

The strikingly large decline in joblessness, from a high of 10.8% of the civilian labor force to 8.4% by November 1983 has been a key factor in the upbeat mood of consumers. For 1984, however, a further reduction in the unemployment rate will be harder to achieve, as the economy's rate of advance slows down. However, a slowing in the growth of the working age population due to the reduced birth rates of the mid-1960's will help keep the jobless rate at the 8% level or lower by the end of 1984.

Economists generally see a moderate rise in inflation in 1984--in the 5%-to-6% range for the consumer price index as against a rise of less than 4% in 1983. Not all agree, however. Some analysts anticipate a rate of at least 7% in inflation next year. However, in November 1983, consumer prices rose only 0.3% from October and just 3.2% above the November 1982 level. This means that inflation for the year 1983 may be the lowest since 1967 when prices rose 2.9%.

In viewing the outlook for soft goods in 1984, Kurt Salmon Associates looks for the good momentum in the latter part of 1983 to be sustained by the improved economy and by the appeal of new styles and end-uses in apparel. Recently strong categories like jeans, designer labels, and logo insignias may be weaker in 1984, but the slack will be taken up by other items, according to KSA.

In the 12-month period ending September 1983 compared with the same 1982 period, women's wear unit consumption was up an estimated 6%, with activewear looks doing best. Jeans consumption is expected to remain static in 1984, but growth is expected in other pant styles.

On a unit basis, consumption of men's wear is expected to be up 2.5% in 1984, according to KSA estimates, with the casual/activewear influence the prime mover.

Projections on the movement of key economic indicators affecting consumer markets in 1984 have been compiled by Morgan Guaranty Trust Company of New York as follows:

Economic Projections
(Percent change at annual rate from previous quarter, except where noted)

	1983	1984			
	Q4	Q1	Q2	Q3	Q4
Real Gross National Product	5.5	4.6	4.5	4.6	4.6
Real consumer spending	4.0	4.5	3.4	3.3	2.9
Real business-capital outlays	12.3	9.9	9.2	8.6	9.9
GNP deflator	4.5	4.6	4.3	4.4	4.8
Consumer prices	4.9	4.9	4.7	4.6	4.5
Real disposable personal income	6.0	2.4	2.8	3.2	3.5
Saving rate (%)	5.3	4.8	4.7	4.6	4.8
Housing starts (millions)	1.7	1.7	1.7	1.7	1.7
Auto sales (millions)	9.6	9.9	10.1	10.3	10.4
Unemployment rate (%)	8.5	8.3	8.1	7.9	7.8

Source: The Morgan Guaranty Survey, December 1983.

POPULATION TRENDS

Births

The most recent year for which the National Center for Health Statistics has issued data on annual births by age of mother is 1981, but this shows the trend to an increasing share of the total among older mothers.

Distribution of Births By Age of Mother, 1978-1981

	1981	1980	1979	1978
Total births	100.0%	100.0%	100.0%	100.0%
Age of mother:				
Under 20 years	14.8	15.6	16.0	16.6
20 to 24 years	33.4	33.9	34.0	34.2
25 to 29 years	31.1	30.7	30.6	30.5
30 to 35 years	16.0	15.2	14.8	14.2
35 & older	4.7	4.6	4.6	4.5

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics,
Advance Report of Final Natality Statistics
(Vol. 32, No. 9, Dec. 1983).

There are significant differences in birth rates on the basis of race, as noted in a Census Bureau report which showed the rate of births up to June 1982 for women 18 to 34 years of age. Among women of the white race, the rate per 1,000 in the population was 1,024 births; among black women, 1,504; among women of Spanish origin (which could be any race), 1,467.

Live Births in the U.S., Birth Rates & Fertility Rates, 1972-1982

	Number (thous.)				Birth Rate*				Fertility Rate**			
			All Other				All Other				All Other	
Year	All Races	White	Total#	Black	All Races	White	Total#	Black	All Races	White	Total#	Black
1982(p)	3,704.0	na	na	na	16.0	na	na	na	67.8	na	na	na
1981(p)	3,629.2	2,908.7	720.6	587.8	15.8	14.8	22.0	21.6	67.4	63.9	86.4	85.4
1980	3,612.3	2,898.7	713.5	589.6	15.9	14.9	22.5	22.1	68.4	64.7	88.6	88.1
1979	3,494.4	2,808.4	686.0	577.9	15.6	14.5	22.2	22.0	67.2	63.4	88.5	88.3
1978	3,333.3	2,681.1	652.2	551.5	15.0	14.0	21.6	21.3	65.5	61.7	87.0	86.7
1977	3,326.6	2,691.1	635.6	544.2	15.1	14.1	21.6	21.4	66.8	63.2	87.7	88.1
1976	3,167.8	2,567.6	600.2	514.2	14.6	13.6	20.8	20.5	65.0	61.5	85.8	85.8
1975	3,144.2	2,552.0	592.2	511.6	14.6	13.6	21.0	20.7	66.0	62.5	87.7	87.9
1974	3,160.0	2,575.8	584.1	507.2	14.8	13.9	21.2	20.8	67.8	64.3	89.8	89.7
1973	3,137.0	2,551.0	585.9	512.6	14.8	13.8	21.7	21.4	68.8	64.9	93.4	93.6
1972	3,258.4	2,655.5	602.8	531.3	15.6	14.5	22.8	22.5	73.1	68.9	99.5	99.6

na = not available
(p) = provisional
* Live births per 1,000 population
**Live births per 1,000 women 15-44 years of age.
# Includes races not separately reported.

Source: U.S. Dept. of Health & Human Services
National Center for Health Statistics,
Advance Report of Final Natality Statistics
(Vol. 32, No. 9, Dec. 1983)

POPULATION TRENDS

Births

In the 12 months ending June 1982, of the estimated 3,433,000 women 18 to 44 years old who had borne a child, 37% had a first birth, resulting in a first-birth rate of 25.9 per 1,000 women. This is significant for marketers of infants' wear and supplies--a market estimated at some $17 billion in 1982. First-borns account for a disproportionate share of this market, as hand-me-downs account for much of the wardrobes, etc., of subsequent children.

Provisional estimates for the year 1982 place the total number of births in the U.S. that year at 3,704,000, representing a 2% gain over the 1981 total of 3,629,238 and the highest level since the year 1970. The 1982 birth rate was 16.0 live births per 1,000 population compared with 15.8 rate in 1981.

In the first eight months of 1983, estimated births fell 1% below the comparable total for 1982. The January-August 1983 birth rate of 15.6 per 1,000 population fell 2% below the 1982 rate in the same period.

The modest increase in the number of births between 1981 and 1982 reflects the continuing but substantially reduced rate of growth in the number of women of childbearing age and the increase in the rate of childbearing. Overall between 1981 and 1982, the number of women aged 18-44 years increased by 1%. However, within this group, increases were observed only for women aged 25-29 (3%), 35-39 (8%) and 40-44 years (3%). Except for women 25-29 years of age, women in these age groups traditionally have very low rates of childbearing. The number of women aged 15-19, 20-24 and 30-34 declined by less than 1% to 3% between 1981 and 1982. Women in these age groups accounted for nearly two-thirds of all births in 1980.

According to recently issued population projections by the Census Bureau, the number of women of childbearing ages will increase by about 1% annually through 1985. The annual number of births, therefore, should continue to rise, although slightly, unless there are offsetting declines in age-specific birth rates. Between 1985 and 1990, the number of women aged 15-44 years is expected to stabilize with annual increases of less than 1%. Slight declines in this population are anticipated between 1990 and 2000.

The average number of lifetime births expected by women 18 to 24 years old in 1982 was 1,994 per 1,000 women. This rate has remained stable since 1976. If these expectations are realized, their completed fertility will be below the level needed for the natural replacement of their generation (2.1 births per woman).

The women in the U.S. population who are in the prime childbearing years of 18 to 44 represent the baby boom generation, and there are a record number of these women, totaling over 49 million persons, or 41% of the resident female population as of 1982. Within this broad age group, however, there have been significant changes in the percent of women of different age sub-groups who are having children. The sharp increase in the number of younger women entering the labor force and the rising costs of bearing and raising children are factors.

POPULATION TRENDS

Births

While the overall level of fertility did not change significantly between 1980 and 1982, there was some evidence of a decline in the fertility rate for women 18 to 24 years (from 96.6 to 88.3 per 1,000 during this period). This decline was offset by an increase in the fertility rate for women 30 to 34, an increase which began in the mid-1970's and is continuing. This reflects a change toward later childbearing as women who had delayed or postponed childbearing to pursue careers have decided to have families.

Births Per 1,000 Women by Age, June 1980-June 1982

	12-Month Periods, Ending In June			% Change
Age of Women	1982	1981	1980	1980-1982
18 to 44 years	70.5	70.9	71.1	- 0.6%
18 to 24 years	88.3	92.1	96.6	- 8.3
25 to 29 years	110.7	112.8	114.8	- 3.1
30 to 34 years	73.5	67.3	60.0	+ 13.5
35 to 39 years	29.4	28.6	26.9	+ 2.5
40 to 44 years	10.5	7.1	9.9	+ 0.6

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 379

The monthly pattern in the number of births is quite consistent from year to year, peaking in July/August.

Monthly Pattern in Number of Births, 1981, 1982

	1982	1981
Annual total	100.0%	100.0%
January	8.4	8.3
February	7.6	7.9
March	8.0	8.1
April	7.7	7.6
May	8.2	8.1
June	8.1	8.0
July	9.1	9.0
August	8.7	9.0
September	8.5	8.7
October	8.7	8.8
November	8.1	8.0
December	8.6	8.4

Source: Based on National Center for Health Statistics data.

POPULATION TRENDS

Births

Census Bureau reports show regional variations in fertility rates. A high fertility rate in 1982 was found among women residing in the Mountain Division (90.7 per 1,000 compared with the national average rate of 70.5). Lower rates are found in New England (61.6 per 1,000) and Middle Atlantic (60.6 per 1,000) Divisions. Additionally, a much higher proportion of women in New England are childless (43%) than in the Mountain Division (36%).

Births per 1,000 Women Age 18-44 In Year Ending June 1982
& Percent Childless As Of June 1982

	Women 18-44 Yrs.		Births Per	
	No. (thous.)	%	1,000 Women	% Childless
U.S. total	48,666	100.0	70.5	38.2
New England	2,570	5.3	61.6	43.0
Middle Atlantic	7,603	15.6	60.6	41.9
East North Central	8,886	18.3	73.3	38.0
West North Central	3,498	7.2	70.7	39.2
South Atlantic	7,981	16.4	67.4	36.6
East South Central	3,137	6.4	70.7	31.6
West South Central	5,134	10.5	79.6	33.7
Mountain	2,577	5.3	90.7	36.1
Pacific	7,278	15.0	70.6	41.2

Source: U.S. Bureau of the Census, Current Population Reports,
Series P-20, No. 379 (May 1983)

Total Population

As of the 1st of October 1983, the resident population of the U.S. reached a total estimated at 234,359,000, gaining over 2 million persons in a 12-month period. There were 7.8 million more people in the resident population than the total when the complete census was compiled April 1, 1980 (226,546,000).

The total population of the U.S. including Armed Forces overseas numbered 234,875,000 as of October 1983, compared with 227,061,000 as of April 1980.

Estimated Population of the U.S.
(In Thousands)

	Total Including Armed Forces Overseas	Resident Population	Civilian Population
October 1, 1983	234,875	234,359	232,672
October 1, 1982	232,702	232,182	230,522
April 1, 1980 (Census)	227,061	226,546	224,968
April 1, 1970	204,401	203,302	201,131

Source: U.S. Bureau of the Census, Current Population Reports,
Series P-25, No. 941 (November 1983)

POPULATION TRENDS

Population By Age & Sex

The population in the younger age groups (5 to 13 years) and school enrollment have reflected the long term decline in births since the middle 1960's. With the rise in the number of births since the middle 1970's, the population under 5 is growing again, so that stabilization and some small growth in the elementary school-age population can be expected soon. Constriction of the population 14 to 17 continues as the last of the baby boom generation passes through high school. That age group has declined by almost 8% since 1980--the largest decline for any age group. The young adult population (18 to 24), which grew enormously in the 1960's and 1970's, has begun to decline since 1981.

The fastest growing age group in the 1970's, ages 25 to 34, increased by 2.2 million or 6% from 1980 to 1982. This group will continue to grow during the 1980's, but at a greatly reduced rate.

In 1982, the oldest cohort of the baby boom entered the 35-to-44 year age group, which has had the largest increase of any age group since 1980 (2.4 million or 9.5%). This is still the most rapidly growing age group and it will continue to be for years to come, as the baby boom generation approaches middle age.

The population in ages 45 to 54 is beginning to decline. The 55-to-64 age group, now growing slowly, will begin to decline in size, reflecting the low birth levels in the 1920's and in the Depression years. By contrast, the elderly population (65 and over) continues to grow rapidly, having increased by 1.3 million or 5.0% since 1980.

The population is aging. In 1982 the median age was 30.6 years, up from 30.0 years in 1980. The median is heading for 36 by the year 2000.

The baby boom generation (1947-1964) remains the most significant factor for marketers. This group is entering their prime consumption years. By 1990, a third of the entire U.S. population will be aged 25 to 44--a middle-aged population component that will have enormous market power and influence. Added to their numbers is the growth in buying power represented by higher incomes and two-earner families.

Distribution of the Resident Population By Age & By Sex, 1980, 1982

	Number (000) (July 1)		% Distribution		% Change
	1982	1980	1982	1980	1982/1980
Total all ages	231,534	227,202	100.0%	100.0%	+ 1.9%
Under 5 years	17,372	16,457	7.5	7.2	+ 5.5
5 to 9 years	15,956	16,598	6.9	7.3	- 3.9
10 to 14 years	18,024	18,229	7.8	8.0	- 1.1
15 to 24 years	41,508	42,481	17.9	18.7	- 2.3
25 to 34 years	39,301	37,418	17.0	16.5	+ 5.0
35 to 44 years	28,079	25,820	12.1	11.4	+ 8.7
45 to 54 years	22,374	22,730	9.7	10.0	- 1.6
55 to 64 years	22,094	21,756	9.5	9.6	+ 1.5
65 & over	26,824	25,714	11.6	11.3	+ 4.3
Median age	30.6	30.0	--	--	+ 2.0

(continued)

POPULATION TRENDS

Population by Age & Sex

Distribution of the Resident Population By Age & By Sex, 1980, 1982 (continued)

	Number (000) (July 1)		% Distribution		% Change
	1982	1980	1982	1980	1982/1980
Male population, total	112,498	110,398	100.0%	100.0%	+ 1.9%
Under 5 years	8,886	8,417	7.9	7.6	+ 5.6
5 to 9 years	8,161	8,489	7.2	7.7	- 3.9
10 to 14 years	9,214	9,309	8.2	8.4	- 1.0
15 to 24 years	20,990	21,433	18.7	19.4	- 2.1
25 to 34 years	19,532	18,563	17.4	16.8	+ 5.2
35 to 44 years	13,796	12,667	12.3	11.5	+ 8.9
45 to 54 years	10,820	10,980	9.6	9.9	- 1.4
55 to 64 years	10,321	10,173	9.2	9.2	+ 1.4
65 & over	10,778	10,367	9.6	9.4	+ 4.0
Median age	29.4	28.9	--	--	+ 1.7
Female population, total	119,035	116,804	100.0	100.0	+ 1.9
Under 5 years	8,486	8,039	7.1	6.9	+ 5.6
5 to 9 years	7,796	8,109	6.5	6.9	- 3.9
10 to 14 years	8,811	8,920	7.4	7.6	- 1.2
15 to 24 years	20,518	21,048	17.2	18.0	- 2.5
25 to 34 years	19,769	18,856	16.6	16.1	+ 4.8
35 to 44 years	14,283	13,153	12.0	11.3	+ 8.6
45 to 54 years	11,553	11,750	9.7	10.1	- 1.7
55 to 64 years	11,773	11,582	9.9	9.9	+ 1.6
65 & over	16,046	15,346	13.5	13.1	+ 4.6
Median age	31.9	31.3	--	--	+ 1.9

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 929 (May 1983)

Population By Race

Although the same general pattern of population change by age is apparent for Whites and for Blacks, the Black population is growing more rapidly, particularly the segment under 5 years of age. Blacks under 5 years of age accounted for 7.1% of the Black population total in 1982 compared with 6.9% in 1980.

Whites represented 85.5% of the total U.S. resident population in 1982; Blacks, 11.9%; other races, 2.6%. Comparable percentages for 1980 were 85.9%, 11.8% and 2.3%, respectively. The median age for Black and other non-White races in the 1982 resident population was 25.8 years--almost six years younger than the median for Whites.

POPULATION TRENDS

Population By Race

In terms of origin, the fastest growth has been among persons of Spanish derivation. According to the 1980 Census of Population, they increased 61% in number compared with the 1970 Census count. Hispanics of Mexican descent accounted for 60% of the 14,609,000 persons of Spanish origin in the U.S. resident population in 1980; 14% were Puerto Rican, 5% Cuban and 21% of other Spanish origin.

Projections of the U.S. Population

In October 1982 the U.S. Census Bureau issued an advance report covering a new series of projections on the U.S. population by age, race and sex for 1982 to the year 2050, based on July 1, 1981, population estimates. The three series are derived from alternative assumptions on fertility, mortality and net immigration levels. Projections for the year 1985, for example, range from a low of 237,366,000 for the total U.S. population to a high of 240,364,000.

The following table is the "middle" series, reflecting the middle assumptions on future developments in the three factors, and looking to a population totaling 238,648,000 by 1985.

The fastest growing segment of the population in the near future will be the 30-44 year old age group. It will grow to 64 million by 1995 from 47 million in 1980, a 36% increase. The population aged 18 to 21 years, so important to colleges, the military and employers, will decline to 13 million persons by 1995 from 17 million in 1980.

Compared with 1982 counts, the age group 15-to-19 years will decline from 8.5% of the total U.S. population to 6.5% by 1995; the 20-24 group will drop from 9.4% to 6.6% and the 25-34 age group from 17% to 15.6% in the same span of time. Persons age 35-to-44 years, which represented 12.1% of the population in 1982, will account for 16.2% by 1995, according to the middle series of projections; those 45 to 54 will jump from 9.6% to 12.1%. The 55-64 age group will decline from 9.5% in 1982 to 8.0% in 1995, but the 65-and-older group will jump from 11.6% of the total to 13.1% from 1982 to 1995.

Projections of the Resident Population of the U.S.
By Age & Sex, 1985, 1990, 2000
(Middle series projections in thousands)

	1985	1990	2000	% Change 1990/1982	% Change 2000/1982
Total, all ages	238,648	249,203	267,462	+ 7.6%	+ 15.5%
Under 5 years	18,462	19,200	17,624	+ 10.5	+ 1.4
5-14 years	33,380	35,376	38,276	+ 4.2	+ 12.7
15-19 years	18,405	16,895	18,888	- 14.6	- 4.6
20-24 years	21,282	18,352	16,910	- 15.5	- 22.1
25-34 years	41,781	43,325	36,206	+ 10.2	- 7.9
35-44 years	31,998	37,783	43,655	+ 34.4	+ 55.5
45-54 years	22,461	25,384	37,086	+ 13.4	+ 65.7
55-64 years	22,207	21,089	23,779	- 4.5	+ 7.6
65 years & older	28,673	31,799	35,036	+ 18.5	+ 30.6

(continued)

Projections of the U.S. Population

Projections of the Resident Population of the U.S. By Age & Sex, 1985, 1990, 2000

(Middle series projections in thousands)
(continued)

	1985	1990	2000	% Change 1990/1982	% Change 2000/1982
Male, total	116,124	121,014	129,895	+ 7.6%	+ 15.5%
Under 5 years	9,453	9,831	9,023	+ 10.6	+ 1.5
5-14 years	17,068	18,096	19,590	+ 4.1	+ 12.7
15-19 years	9,390	8,605	9,630	- 14.7	- 4.5
20-24 years	10,800	9,242	8,518	- 15.5	- 21.9
25-34 years	20,900	21,701	18,195	+ 11.1	- 6.8
35-44 years	15,780	18,664	21,772	+ 35.3	+ 57.8
45-54 years	10,882	12,333	18,162	+ 14.0	+ 67.9
55-64 years	10,377	9,889	11,270	- 4.2	+ 9.2
65 years & older	11,473	12,652	13,734	+ 17.4	+ 27.4
Female, total	122,525	128,189	137,566	+ 7.7	+ 15.6
Under 5 years	9,009	9,369	8,600	+ 10.4	+ 1.3
5-14 years	16,311	17,280	18,686	+ 4.0	+ 12.5
15-19 years	9,015	8,290	9,257	- 14.6	- 4.6
20-24 years	10,482	9,111	8,393	- 15.7	- 22.4
25-34 years	20,881	21,624	18,011	+ 9.4	- 8.9
35-44 years	16,218	19,118	21,883	+ 33.8	+ 53.2
45-54 years	13,147	13,051	18,924	+ 13.0	+ 63.8
55-64 years	11,829	11,200	12,509	- 4.9	+ 6.2
65 years & older	17,200	19,146	21,302	+ 19.3	+ 32.8

NOTE: "Middle series" projections reflect the middle assumptions about future levels of fertility, mortality and net migration.

Source: U.S. Bureau of the Census,
Provisional Projections of the Population of States, By Age and Sex: 1980 to 2000
P-25 No. 937 (October 1982)

The changing components of population growth expected in coming years will lead to marked changes in the age and race distribution of the population over the next 70 years. Among the significant developments envisioned in the "middle" projections are the following:

- Overall, U.S. population growth will be slower than in the preceding decade. During the 1970's, the population grew 11%. Projected growth for the 1980's is only 9.7% and growth in the 1990's will be an even slower 7.3%.

- The population of primary-school age (5 to 13 years) would decrease from 30.7 million in 1981 to 29.6 million in 1985, after which it would increase to 34.4 million by 1995.

POPULATION TRENDS

Projections of the U.S. Population

- The population of secondary-school age (14 to 17 years) would decline from 14.9 million in 1981 to 12.9 million in 1990 before increasing to 15.4 million in 2000.
- The population of 18-and-19 year olds, the prime group entering the labor force, college, and the Armed Forces, would decline from 8.5 million in 1981 to 6.5 million in 1995 before rising slowly to 7.5 million in 2000.
- The population of young adults aged 25 to 34 would increase briefly from 39 million in 1981 to 44 million in 1990 before declining to 36 million in 2000.
- Overall, the U.S. population would grow older, with the median age increasing from 30.3 years in 1981 to 36.3 years in 2000 and 41.6 years in 2050.

A special Census Bureau report on the elderly projected that the number of persons aged 65 and over will represent 19% of the total population by 2025 compared with 11% in 1982. No other age group will grow as rapidly over the next 50 years. By 2010, because of the maturation of the baby boom group, 25% of the U.S. population will be at least 55 years old.

Population by Regions & States

Population in the West South Central division of the U.S. showed the largest percentage growth, 5.7%, between 1980 and 1982, well above the U.S. rise of 2.2%. Texas was the biggest gainer in the division with a 7.4% rise to 15.3 million people.

States in the Mountain division rose about as much, up 5.2% over 1980. This division included a 10.0% increase, the highest of any state, in Nevada's population.

The East North Central division was the only one which lost population over the two year span. Other divisions in the Northeast and North Central regions recorded sub-U.S. average increases. Since 1970, the North's share of the U.S. population has declined to 47% from 53%.

Resident Population of States & Regions, 1980, 1982

	Number (000) July 1, 1982	% of U.S. Total	(Number 000) April 1, 1980 (Census)	% of U.S. Total	% Change 1982/1980
U.S. total	231,534	100.0%	226,546	100.0%	+ 2.2%
New England, total	12,493	5.4	12,348	5.4	+ 1.2
Maine	1,133	0.5	1,125	0.5	+ 0.7
New Hampshire	951	0.4	921	0.4	+ 3.3
Vermont	516	0.2	511	0.2	+ 1.1
Massachusetts	5,781	2.5	5,737	2.5	+ 0.8
Rhode Island	958	0.4	947	0.4	+ 1.2
Connecticut	3,153	1.4	3,108	1.4	+ 1.5

(continued)

Population by Regions & States

Resident Population of States & Regions, 1980, 1982
(continued)

	Number (000) July 1, 1982	% of U.S. Total	Number (000) April 1, 1980 (Census)	% of U.S. Total	% Change 1982/1980
Middle Atlantic, total	36,963	16.0%	36,787	16.2%	+ 0.5%
New York	17,659	7.6	17,558	7.7	+ 0.6
New Jersey	7,438	3.2	7,365	3.2	+ 1.0
Pennsylvania	11,865	5.1	11,864	5.2	--
East North Central, total	41,585	18.0	41,682	18.4	- 0.2
Ohio	10,791	4.7	10,798	4.8	- 0.1
Indiana	5,471	2.4	5,490	2.4	- 0.4
Illinois	11,448	4.9	11,427	5.0	+ 0.2
Michigan	9,109	3.9	9,262	4.1	- 1.7
Wisconsin	4,765	2.1	4,706	2.1	+ 1.3
West North Central, total	17,342	7.5	17,183	7.6	+ 0.9
Minnesota	4,133	1.8	4,076	1.8	+ 1.4
Iowa	2,905	1.2	2,914	1.3	- 0.3
Missouri	4,951	2.1	4,917	2.2	+ 0.7
North Dakota	670	0.3	653	0.3	+ 2.6
South Dakota	691	0.3	691	0.3	--
Nebraska	1,586	0.7	1,570	0.7	+ 1.0
Kansas	2,408	1.0	2,364	1.0	+ 1.9
South Atlantic, total	38,213	16.5	36,959	16.3	+ 3.4
Delaware	602	0.3	594	0.3	+ 1.3
Maryland	4,265	1.8	4,217	1.9	+ 1.1
District of Columbia	631	0.3	638	0.3	- 1.1
Virginia	5,491	2.4	5,347	2.4	+ 2.7
West Virginia	1,948	0.8	1,950	0.9	- 0.1
North Carolina	6,019	2.6	5,882	2.6	+ 2.3
South Carolina	3,203	1.4	3,122	1.4	+ 2.6
Georgia	5,639	2.4	5,463	2.4	+ 3.2
Florida	10,416	4.5	9,746	4.3	+ 6.9
East South Central, total	14,812	6.4	14,666	6.5	+ 1.0
Kentucky	3,667	1.6	3,661	1.6	+ 0.2
Tennessee	4,651	2.0	4,591	2.0	+ 1.3
Alabama	3,943	1.7	3,894	1.7	+ 1.3
Mississippi	2,551	1.1	2,521	1.1	+ 1.2
West South Central, total	25,111	10.8	23,747	10.5	+ 5.7
Arkansas	2,291	1.0	2,286	1.0	+ 0.2
Louisiana	4,362	1.9	4,206	1.9	+ 3.7
Oklahoma	3,177	1.4	3,025	1.3	+ 5.0
Texas	15,280	6.6	14,229	6.3	+ 7.4

(continued)

Population by Regions & States

Resident Population of States & Regions, 1980, 1982
(continued)

	Number (000) July 1, 1982	% of U.S. Total	Number (000) April 1, 1980 (Census)	% of U.S. Total	% Change 1982/1980
Mountain, total	11,967	5.2%	11,373	5.0%	+ 5.2%
Montana	801	0.3	787	0.3	+ 1.8
Idaho	965	0.4	944	0.4	+ 2.3
Wyoming	502	0.2	470	0.2	+ 6.8
Colorado	3,045	1.3	2,890	1.3	+ 5.4
New Mexico	1,359	0.6	1,303	0.6	+ 4.3
Arizona	2,860	1.2	2,718	1.2	+ 5.2
Utah	1,554	0.7	1,461	0.6	+ 6.4
Nevada	881	0.4	800	0.3	+ 10.1
Pacific, total	33,049	14.3	31,800	14.0	+ 3.9
Washington	4,245	1.8	4,132	1.8	+ 2.7
Oregon	2,649	1.1	2,633	1.2	+ 0.6
California	24,724	10.7	23,668	10.5	+ 4.5
Alaska	438	0.2	402	0.2	+ 8.9
Hawaii	994	0.4	965	0.4	+ 3.0

Source: U.S. Bureau of the Census,
Current Population Reports
Estimates of the Population of States, by Age
P-25 No. 930.

Twelve states--six of them in the South--contained more than 1 million Blacks in 1980. New York State had the largest Black population (2.4 million), followed by California (1.8 million) and Texas (1.7 million).

Only three states in 1980 had more than 1 million Hispanics. California was home to 4.5 million of them, 30.8% of the country's Hispanic population. Texas had just under 3 million persons of Spanish origin and New York, 1.7 million.

Of the 20 states with the largest percentages of Blacks in their populations, 14 were in the South, led by Mississippi (35.2%) and South Carolina (30.4%). New Mexico's population was 36.6% Hispanic in 1980.

Fully half of the Blacks in the U.S. were concentrated in the South region. The proportion of Blacks in the South dropped to 18.6% of the region's population in 1980 compared with 19.1% in 1970. However, the traditional Black migration from the South appears to be abating. Between 1975 and 1980, about 415,000 Blacks moved to the South but only 220,000 left, according to the Census Bureau.

POPULATION TRENDS

Projected Population by Region & Leading States

Through the rest of the 20th Century, the pattern of regional population growth exhibited during the 1970's is projected to continue, according to the Census Bureau. The West will continue to be the fastest growing region in the country, growing 22.2% from 1980 to 1990 and 18.1% from 1990 to 2000.

The South will maintain its place as the second fastest growing region. However, the South will add more people to its population than any other region, increasing almost 24 million between 1980 and 2000.

Projections of the U.S. Population By Regions, 1980-2000
(Totals in Millions)

	Total Population			% Change	% of Population		
	1980	1990	2000	2000/1980	1980	1990	2000
U.S., total	226.5	249.2	267.5	+ 18.1%	100.0%	100.0%	100.0%
Northeast	49.1	48.4	46.4	- 5.5	21.7	19.4	17.3
New England	12.3	12.7	12.8	+ 4.1	5.4	5.1	4.8
Middle Atlantic	36.8	35.7	33.6	- 8.7	16.2	14.3	12.6
North Central	58.8	60.3	59.7	+ 1.5	26.0	24.2	22.3
East North Central	41.7	42.4	41.6	- 0.2	18.4	17.0	15.6
West North Central	17.2	17.9	18.1	+ 5.2	7.6	7.2	6.8
South	75.3	87.6	98.8	+ 31.2	33.3	35.1	37.0
South Atlantic	36.9	43.1	49.0	+ 32.8	16.3	17.3	18.3
East South Central	14.7	16.1	17.2	+ 17.0	6.5	6.5	6.4
West South Central	23.7	28.3	32.7	+ 38.0	10.5	11.4	12.2
West	43.2	52.9	62.5	+ 44.7	19.1	21.2	23.4
Mountain	11.4	15.4	20.1	+ 76.3	5.0	6.2	7.5
Pacific	31.8	37.5	42.4	+ 33.3	14.0	15.0	15.8

NOTE: These are middle series assumptions which project a middle level of fertility, migration and mortality.

Source: U.S. Bureau of the Census, Provisional Projections of the Population of States, by Age & Sex, P-25 No. 937.

Nevada is expected to be the most rapidly growing state in the country, up 59% between 1980 and 1990 and over 50% between 1990 and 2000. As the fastest growing states, Nevada is followed by Wyoming, Arizona and Utah, which are all located in the Mountain region. From 1980 to 1990, Massachusetts, New York, Pennsylvania, Ohio and the District of Columbia are projected to show declines in their populations. In the 1990 to 2000 decade, Rhode Island, Connecticut, New Jersey, Illinois, Michigan, Iowa and South Dakota will join this list.

California will continue to be the largest state, housing over 11% of the U.S. population in the year 2000. If present trends continue through 1990, Texas will surpass New York as the second largest state. By the year 2000, Florida will become the third largest state.

POPULATION TRENDS

Projected Population by Region & Leading States

Population of the 10 Largest States, 1980 & Projections to 1990 & 2000
(Total in Millions)

	1980		1990		2000		
	No.	Rank in U.S.	No.	Rank in U.S.	No.	Rank in U.S.	% Change 2000/1980
California	23.7	1	27.5	1	30.6	1	+ 29.1%
New York	17.6	2	16.5	3	15.0	4	- 14.8
Texas	14.2	3	17.5	2	20.7	2	+ 45.8
Pennsylvania	11.9	4	11.7	5	11.2	5	- 5.9
Illinois	11.4	5	11.5	6	11.2	6	- 1.7
Ohio	10.8	6	10.7	7	10.4	7	- 3.7
Florida	9.7	7	13.3	4	17.4	3	+ 79.4
Michigan	9.3	8	9.4	8	9.2	8	+ 1.1
New Jersey	7.4	9	7.5	9	7.4	9	--
North Carolina	5.9	10	6.5	10	6.9	10	+ 16.9

NOTE: These are middle series assumptions, which project a middle level of fertility, migration and mortality.

Source: U.S. Bureau of the Census,
Provisional Projections of the Population of States, by Age & Sex P-25 No. 937

The Conference Board has compiled a broad outline of the demographic and economic developments anticipated in the next decade in the nation's nine major regions, as summarized in the table below. The Sunbelt States and the West are expected to show the greatest growth in population and in total income, with meager growth in the population of the Middle Atlantic States.

Projections of Population & Personal Income by Place

	Population		Personal Income		Per Capita Income	
	Distribution per 1,000 persons 1990	% Change 1980/1990	Distribution per $1,000 1990	% Change 1980/1990	U.S. Average=100 1980	1990
United States, total	1,000.0	9.4%	$1,000.0	46.5%	100	100
New England	54.0	6.2	52.9	39.3	101	99
Middle Atlantic	151.8	0.5	153.5	32.2	104	104
East North Central	181.4	6.3	188.3	41.6	105	105
West North Central	75.7	6.9	73.7	43.2	97	98
South Atlantic	165.2	13.0	158.0	53.9	94	95
East South Central	65.2	11.2	56.4	57.8	81	87
West South Central	107.6	14.5	105.6	57.7	94	95
Mountain	54.1	19.9	53.3	65.8	95	96
Facific	145.0	14.1	158.3	48.7	112	108

Source: U.S. Department of Commerce; The Conference Board (*Across the Board*, May 1981).

POPULATION TRENDS

Urban versus Rural Areas

In a reversal of a long-established trend toward urban living, rural areas and small towns grew in population at a faster rate than central cities and suburbs in the 1970's, according to the 1980 Census. This new trend is expected to continue through the 1980's and beyond.

Nearly three-quarters of the U.S. population lived in urban areas in 1980, including 71% of whites, 85% of blacks and almost 90% of persons of Spanish origin. But only 25% of whites living in America's central cities compared with over half of all black persons and almost half of all Hispanics.

Urban & Rural Population of the U.S.
By Race, 1980
(In Thousands)

	All Races	White	Black	Persons of Spanish Origin
Total	226,546	188,372	26,495	14,609
Urban	167,051	134,322	22,595	13,134
Inside urbanized areas	139,171	110,149	20,106	11,552
Central cities	67,035	46,409	15,144	7,134
Urban fringe areas	72,135	63,740	4,962	4,418
Outside urbanized areas	27,880	24,172	2,488	1,581
Rural	59,495	54,050	3,901	1,475

Percent Distribution

	All Races	White	Black	Persons of Spanish Origin
Total	100.0%	100.0%	100.0%	100.0%
Urban	73.7	71.3	85.3	89.9
Inside urbanized areas	61.4	58.5	75.9	79.1
Central cities	29.6	24.6	57.2	48.8
Urban fringe areas	31.8	33.8	18.7	30.2
Outside urbanized areas	12.3	12.8	9.4	10.8
Rural	26.3	28.7	14.7	10.1

Source: U.S. Bureau of the Census,
1980 Census of Population.
U.S. Summary PC80-1-B1.

Mobility

About 17% of the U.S. population changed residences between 1980 and 1981. Most moves were for short distances. Almost 63% were within the same county, 83% were within the same state and 91% were within the same region.

POPULATION TRENDS

Mobility

Among the most frequent movers, about 38% of the 20 to 24 year olds and 31% of the 25 to 29 year olds reported living in a different house one year earlier. Between 1980 and 1981, blacks had a higher overall rate of moving (18%) than whites (16%); however, blacks tended to move shorter distances than whites.

Mobility Status of the Population
March 1980-March 1981

	U.S. Total	Under 14 Years	15-24 Years	25-34 Years	35-54 Years	53 Years & Over
Persons 1 year old & over (in millions)	221.6	47.6	41.2	37.8	48.7	46.4
Residence in 1981 compared with 1980						
Total (percent)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Living in:						
Same house	82.8	81.0	72.6	73.9	89.0	94.2
Different house in U.S.	16.6	18.4	26.4	25.3	10.5	5.5
Same county	10.4	11.9	16.8	15.7	6.3	3.1
Different county	6.2	6.4	9.6	9.6	4.3	2.3
Same state	3.4	3.4	5.4	5.5	2.3	1.2
Different state	2.8	3.0	4.1	4.1	2.0	1.2
Northeast	0.5	0.4	0.7	0.8	0.3	0.2
North Central	0.7	0.8	1.0	1.0	0.5	0.3
South	1.0	1.1	1.4	1.3	0.7	0.4
West	0.7	0.7	1.1	1.0	0.5	0.2
Movers from abroad	0.6	0.6	1.0	0.8	0.4	0.2

Source: U.S. Bureau of the Census,
Geographical Mobility: March 1980-March 1981
P-20 No. 377

MARRIAGES & MARITAL STATUS

In 1982, 2.5 million couples married, 2% more than in 1981 and the seventh consecutive year the number of marriages has risen. Except for 1974 and 1975, the number increased every year after 1958 and reached a new national record in 1982.

For the first 7 months of 1983, the number of marriages declined 3.1% compared with same 1982 period. The marriage rate for the January-July 1983 period was 10.1 per 1,000 population, 4% below the comparable rate (10.5) in 1982.

For the year 1982, the provisional marriage rate rose to 10.8 per 1,000 population. Except for 1972 and 1973, the rate has not been this high since 1950.

Marriages typically follow a seasonal pattern with a low number in winter and a high number in summer. In 1982, the highest number occurred in June and the lowest was the January total.

MARRIAGES & MARITAL STATIS

Marriages & Marriage Rates in the U.S., 1976-1982

Year	Number	Rate per 1,000 of Total Population
1982(p)	2,495,000	10.8
1981(p)	2,438,000	10.6
1980	2,390,252	10.6
1979	2,331,337	10.4
1978	2,282,272	10.3
1977	2,178,367	9.9
1976	2,154,807	9.9

(p) = provisional.

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics,
Monthly Vital Statistics Report.

Women are now marrying fully 2 years later, on average, than they did in the post-World War II period (22.5 years versus 20.4 years in 1948), as a growing share remain single until after the typical age of college graduation.

Results of the Census Bureau's Current Population Survey in March 1983 indicate that about 39% of women under 40 were single (never married) as were close to half of all men under 40 years of age.

Distribution of Single (Never Married) Population by Age Group
(Noninstitutionalized Population)

	Females			Males		
	1983	1980	1970*	1983	1980	1970*
Total 15 years & older	22.9%	22.5%	22.1%	30.0%	29.6%	28.1%
15 to 19 years	93.4	91.2	90.3	98.1	97.3	97.4
20 to 24 years	55.5	50.2	35.8	73.2	68.8	54.1
25 to 29 years	24.8	20.9	10.5	38.2	33.1	19.1
30 to 34 years	13.0	9.5	6.2	19.6	15.9	9.4
35 to 39 years	7.2	6.2	5.4	10.1	7.8	7.2
40 to 44 years	5.2	4.8	4.9	6.8	7.1	6.3
45 to 54 years	4.5	4.7	4.9	6.0	6.1	7.5
55 to 64 years	4.4	4.5	6.8	4.2	5.3	7.8
65 years & over	5.4	5.9	7.7	4.8	4.9	7.5

* Figures for 1970 include persons age 14.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 382 (July 1983)

MARRIAGES & MARITAL STATUS

Divorce

An estimated 1.18 million couples divorced in 1982, a 3.2% reduction from 1981, the first annual decrease in 20 years. Between 1962 and 1981 the number of divorces had almost tripled. The divorce rate declined in 1982 to 5.1 per 1,000 population compared with 5.3 in 1981. For the first seven months of 1983, the divorce rate was 5.0 per 1,000 population, below the 5.1 rate for the same 1982 period. The actual number of divorces over this 1983 time period was 1.8% below the comparable 1982 time frame.

Starting at 2.2 per 1,000 population in 1962, the divorce rate reached a high of 5.3 for the first time in 1979. The 1970's were the first decade in American history that more marriages ended every year in divorce than in death, and current estimates are that almost half of all marriages that occurred in the early 1970's will end in divorce.

HOUSEHOLDS & FAMILIES

There were 83.9 million households in the U.S. as of March 1983, according to the advance results of the Current Population Survey, only 391,000 more than in 1982. This marks the first time in 20 years that there was no statistically significant increase in the number of households. The number of households headed by 25-34 year olds--the prime group for household formation--declined by 223,000 in 1983.

About 61.3 million households in 1983 are maintained by families (two or more related persons). The large increase over the past 15 years in the number of families maintained by women with no husband present has been one of the most remarkable aspects of recent changes in the composition of families. Since 1970, the number of family households with a female head increased 72%.

Another major trend characterizing changes in household structure in recent years has been the tremendous increase in the number of nonfamily households (householders who either live alone or with others to whom they are not related). About 85% of all nonfamily households in 1983 are persons living alone.

The decline in average household size which began in the mid-1960's, has been interrupted. Average household size increased slightly (although the change was not statistically significant) between 1982 and 1983, a change that is consistent with low household growth.

Recent demographic trends do not account for these changes in household formation patterns. For example, persons roughly 20-35 years of age (baby boomers) are still at the ages where they would be expected to form households at a high rate. Therefore, it appears that the changes observed in 1983 may be a response to a shift in economic conditions and/or to a different social climate. On the four months following the March 1983 survey, household formations did pick up, gaining an estimated 300,000 households in that time, although still depressed from earlier years. According to Chase Econometrics, the number of new household formations, in the 12 months ending March 1984, will approach a record 2 million.

Households & Families by Size & Type
(Numbers in thousands as of March of each year)

	1983		1982	1981	1980		% Change
	Number	%	Number	Number	Number	%	1983/1980
Households, total	83,918	100.0%	83,527	82,368	80,776	100.0%	+ 3.9%
Family households	61,393	73.2	61,019	60,309	59,550	73.7	+ 3.1
Married-couple family	49,908	59.5	49,630	49,294	49,112	60.8	+ 1.6
Male householder, no wife present	2,015	2.4	1,986	1,933	1,733	2.1	+16.3
Female householder, no husband present	9,470	11.3	9,403	9,082	8,705	10.8	+ 8.8
Nonfamily households	22,525	26.8	22,508	22,059	21,226	26.3	+ 6.1
Male householder	9,514	11.3	9,457	9,279	8,801	10.9	+ 8.1
Female householder	13,011	15.5	13,051	12,780	12,419	15.4	+ 4.8
Living alone	19,250	22.9	19,354	18,936	18,296	22.7	+ 5.2
Average size (number)							
All households	2.73		2.72	2.73	2.76		
Families	3.26		3.25	3.27	3.29		

Source: U.S. Bureau of the Census, Households, Families, Marital Status and Living Arrangements: March 1983 (Advance Report) P-20 No. 382 (July 1983)

Persons maintaining households in 1982 had a median age of 45.8 years, according to the full report on households and families, released by the Census Bureau in 1983. In general, those maintaining family households were significantly younger (median age 44.5 years) than those maintaining nonfamily households (median age 54.2 years).

Among the 72.8 million White households, 73% were family households; the corresponding proportion among Black households was lower (72%) while among householders of Spanish origin it was higher (83%).

Selected Characteristics of Households by Type: March 1982

	All Households	Family Households	Nonfamily Households
All households, total	83,527	61,019	22,508
Percent	100.0%	100.0%	100.0%
Area of residence:			
Metropolitan areas	68.1	66.6	72.4
Nonmetropolitan areas	31.9	33.4	27.6
Region of residence:			
Northeast	21.5	21.2	22.6
North Central	25.4	25.8	24.6
South	33.4	34.3	30.9
West	19.6	18.7	21.9

(continued)

HOUSEHOLDS & FAMILIES

Selected Characteristics of Households by Type: March 1982
(continued)

	All Households	Family Households	Nonfamily Households
Race & Spanish origin*:			
White	87.2%	87.3%	87.0%
Black	10.7	10.5	11.3
Other race	2.1	2.2	1.7
Spanish origin	4.8	5.4	3.0
Age of householder:			
Under 25 years	7.3	5.9	11.1
25-29 years	11.4	10.9	12.8
30-34 years	11.7	12.8	8.9
35-44 years	18.3	21.4	10.0
45-54 years	15.0	17.6	8.0
55-64 years	15.5	16.0	14.2
65 years & older	20.7	15.4	35.1
Presence of children:			
No own children under 18 years	62.9	49.2	100.0
Some own children:			
Under 18 years	37.2	50.8	na
Under 6 years	16.4	22.4	22.2

na = not applicable
* Persons of Spanish origin may be of any race.

Source: U.S. Bureau of the Census
Household & Family Characteristics: March 1982
P-20 No. 381 (May 1983)

LIVING ARRANGEMENTS

During the 12 year period from 1970 to 1982, the living arrangements of children under 18 shifted significantly. The number of children living with both parents represented 75% of all children, or 46.8 million, compared with 85%, or 58.9 million, in 1970. Children living with one parent numbered 13.7 million in 1982, two-thirds more than in 1970. This increase in the number of children living with one parent is all the more striking in view of the overall 10% decline in the total number of all children under 18 that occurred during the 1970-1982 period.

Among children living with one parent, the mother was the custodial parent in 9 out of 10 cases, and most often the mother is divorced. Children living with their fathers still represented a very small proportion of all children (2%).

In 1982, almost one-half of all Black children under 18 years lived with only one parent. An additional 9% lived with someone other than a parent. For White children the corresponding proportions were: 17% with one parent only, and 2% with someone other than a parent. For children of Spanish origin, 69% lived with both parents and 27% with only one parent, typically a separated or divorced mother.

LIVING ARRANGEMENTS

Living Arrangements of Children Under 18 Years Old, 1982
(Excluded persons under 18 years old who were maintaining households or family groups)

	All Races	White	Black	Spanish Origin
Children under 18 years	62,407	51,086	9,377	5,358
Percent	100.0%	100.0%	100.0%	100.0%
Living with:				
Two parents	75.0	80.8	42.4	69.1
One parent	22.0	17.2	49.2	26.8
Mother only	20.0	15.3	47.2	25.3
Divorced	8.2	8.0	9.6	7.4
Married	5.6	4.3	13.6	10.1
Separated	5.0	3.6	12.7	8.6
Widowed	1.8	1.5	3.3	2.3
Single (never married)	4.4	1.6	20.8	5.4
Father only	1.9	1.9	2.0	1.5
Divorced	1.1	1.1	0.9	0.7
Married	0.4	0.5	0.3	0.4
Separated	0.4	0.4	0.3	0.3
Widowed	0.2	0.2	0.3	0.3
Single (never married)	0.2	0.1	0.5	0.2
Other relatives only	2.5	1.5	7.6	3.4
Nonrelatives only	0.6	0.5	0.8	0.7

Source: U.S. Bureau of the Census
Marital Status & Living Arrangements:
March 1982 P-20 No. 380 (May 1983)

In 1983, there were approximately 1.9 million unmarried couples in the U.S., essentially no change from the previous year but 19.0% more than in 1980. Although the number of such couples has increased three-fold since 1970, they represented only about 4% of all couples (including those who are married) in 1983.

The persons maintaining unmarried-couple households in 1983 were generally younger than in 1970: 8 out of 10 unmarried-couples were maintained by someone under age 45 in 1983 compared with only 3 out of 10 in 1970.

Data for 1982 show that in 40% of the unmarried-couples both partners had never been married.

LIVING ARRANGEMENTS

Selected Characteristics of Unmarried-Couple Households
1970, 1980, 1983
(Numbers in Thousands)

	1983		1980		1970		% Change
	Number	%	Number	%	Number	%	1983/1970
Unmarried-couple households	1,891	100.0%	1,589	100.0%	523	100.0%	+261.6%
Sex of householder:							
Male	1,151	60.9	981	61.7	266	50.9	+332.7
Female	740	39.1	608	38.3	257	49.1	+187.9
Age of householder:							
Under 25 years	455	24.1	411	25.9	55	10.5	+727.3
25-44 years	1,082	57.2	837	52.7	103	19.7	+950.5
45-64 years	233	12.3	221	13.9	187	35.8	+ 24.6
65 years & over	121	6.4	119	7.5	178	34.0	- 32.0
Presence of children:*							
No children under 15 years	1,366	72.2	1,159	72.9	327	62.5	+317.7
Some children under 15 years	525	27.8	431	27.1	196	37.5	+167.9

*For 1970, children in unmarried-couple households are under 14 years old.

Source: U.S. Bureau of the Census,
Households, Families, Marital Status
& Living Arrangements: March 1983 (Advance Report)
P-20 No. 382 (July 1983)

SCHOOL ENROLLMENT

Between 1980 and 1981, total school enrollment continued the downward trend which began in 1975. In October of 1981, 58.4 million persons aged 3 to 34 were enrolled in school, including 2.1 million in nursery school, 3.2 million in kindergarten, 27.8 million in elementary school, 14.6 million in high school and 10.7 million in college.

Compared to the peak year of 1970, the number of elementary school enrolled students is off 18% while high school enrollment is 9% below its mid 1970's peak and kindergarten enrollment was also about 12% below its peak of 1976. College enrollment has increased only slightly since 1970 but the number of children enrolled in nursery school is nearly twice that of 1970.

School Enrollment in the U.S.: 1970, 1975, 1981
(Civilian Noninstitutional Population. Numbers in Thousands)
(Ages 3-34 years)

				% to total enrollment		
	1981	1975	1970	1981	1975	1970
Total enrolled	58,390	60,696	60,357	100.0%	100.0%	100.0%
Nursery School	2,058	1,748	1,096	3.5	2.9	1.8
Public	663	574	333	1.1	0.9	0.5
Private	1,396	1,174	763	2.4	1.9	1.2

(continued)

School Enrollment in the U.S.: 1970, 1975, 1981

(Civilian Noninstitutional Population. Numbers in Thousands)
(Ages 3-34 years)
(continued)

				% to total enrollment		
	1981	1975	1970	1981	1975	1970
Kindergarten	3,161	3,393	3,183	5.4	5.6	5.2
Public	2,616	2,851	2,647	4.5	4.7	4.4
Private	545	542	536	0.9	0.9	0.9
Elementary school	27,795	30,446	33,950	47.6	49.9	56.2
Public	24,758	27,166	30,001	42.4	44.6	49.7
Private	3,037	3,279	3,949	5.2	5.4	6.5
High school	14,642	15,683	14,715	25.1	25.7	24.4
Public	13,523	14,503	13,545	23.2	23.8	22.4
Private	1,119	1,180	1,170	1.9	1.9	1.9
College	10,734	9,697	7,413	18.4	15.9	12.3
Public	8,159	7,704	5,699	14.0	12.6	9.4
Private	2,576	1,994	1,714	4.4	3.3	2.8
Full-time	7,569	7,105	5,763	13.0	11.6	9.5
Part-time	3,166	2,592	1,650	5.4	4.3	2.7
Male	5,372	5,342	4,401	9.2	8.8	7.3
Female	5,363	4,355	3,013	9.2	7.1	5.0

Source: Current Population Reports,
U.S. Bureau of the Census,
Series P-20, No. 273. (February 1983)

The long term decline in school enrollment is a direct result of the aging of the baby boom generation of the 1950's-1960's, as well as the lower birth rate since that time.

The National Center for Education Statistics estimated that the trend towards fewer students will continue until the year 1985. In that year, the center estimates that the number of students will climb through the year 1990 until there are a total 61.7 million students.

The increase in college enrollment between 1970 and 1980 has been primarily due to the increased attendance by women during this period. Female enrollment under age 34 in college during this period rose from 3.0 million to 5.4 million while the increase for males was from 4.4 million to 5.4 million. In 1981 women outnumbered men in college in all age categories except the 20-29 year old span.

SCHOOL ENROLLMENT

College Enrollment by Full-Time Status
(Numbers in Thousands)

	1981		1975		1970	
	Total	% Full-Time	Total	% Full-Time	Total	% Full-Time
Male	5,825	68.6%	5,911	69.3%	na	--
14 to 17 years old	96	90.6	128	89.1	130	97.0%
18 to 19 years old	1,450	90.7	1,426	92.8	1,346	95.3
20 to 21 years old	1,239	87.3	1,256	87.5	1,083	92.6
22 to 24 years old	1,144	73.8	1,011	70.7	902	73.3
25 to 29 years old	909	45.2	1,025	48.2	684	48.4
30 to 34 years old	533	32.3	496	38.8	256	28.5
35 years old & over	453	18.5	569	27.8	na	--
Female	6,303	60.9	4,696	66.1	na	--
14 to 17 years old	136	91.2	164	91.5	130	91.5
18 to 19 years old	1,594	91.4	1,517	92.3	1,248	92.7
20 to 21 years old	1,305	84.5	1,058	85.3	774	86.2
22 to 24 years old	842	59.0	668	54.3	452	51.8
25 to 29 years old	808	38.9	590	41.7	255	31.8
30 to 34 years old	677	24.1	357	30.1	154	18.0
35 years old & over	940	18.9	614	19.2	na	--

na - not available

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P20, No. 374.

EDUCATIONAL ATTAINMENT

The current population of young adults has completed substantially more years of school than members of the older generation. Survey results show that about 86% of persons 25 to 34 years of age in 1981 were high school graduates, but among persons 55 to 64 only 63% had completed high school. The difference was much greater among blacks: 76% of the young adults had completed high school, only 32.5% of the older group.

The proportion of persons 25 years old and over who completed at least one year of college was greater for men than women in both 1970 and 1981. In 1970, about 25% of men as compared with 18% of women had attained this level while in 1981 37% of men and 28% of women had completed one year of college.

In 1970, blacks 25 to 34 years old were much less likely than their white counterparts to have completed at least one year of college; 15% for blacks, compared with 31% for whites. By 1981, the proportionate difference had declined as the figures had increased to 34% for blacks and 46% for whites. In the same age group in 1981 the proportion of blacks who had completed one to three years of college was about the same as whites in 1981 (about 22%), but the proportion who had completed four or more years of college was 12% for blacks compared with 24% for whites.

Years of School Completed by the Population 25 Years Old & Over, By Age, Sex, Race, & Spanish Origin: March 1981 & 1970

(Numbers in Millions)

Age, sex, race, Spanish origin, & region	1981	1981 Percent			1970	1970 Percent		
	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More
ALL RACES								
Both sexes, 25 years & over	132.9	69.7%	32.1%	17.1%	109.3	55.2%	21.2%	11.0%
25 to 34 years	37.8	85.6	44.9	23.2	24.9	73.8	29.8	15.8
35 to 44 years	26.2	79.0	37.6	21.5	23.0	64.3	23.8	12.8
45 to 54 years	22.5	69.6	28.8	15.8	23.3	58.2	20.1	10.0
55 to 64 years	21.7	62.6	23.8	12.0	18.4	43.8	17.2	8.7
65 years & over	24.7	41.8	17.3	8.5	19.7	28.3	12.6	6.3
Male, 25 years & over	62.5	70.3	36.7	21.1	51.8	55.0	24.9	14.1
25 to 34 years	18.6	86.1	48.6	26.1	12.2	74.3	34.8	19.7
35 to 44 years	12.8	79.1	42.5	26.2	11.2	63.7	29.0	17.2
45 to 54 years	10.8	68.3	33.8	20.6	11.2	57.0	23.9	13.0
55 to 64 years	10.1	61.8	28.3	16.3	8.7	42.0	18.1	9.9
65 years & over	10.1	40.8	19.1	11.0	8.4	25.9	13.4	7.9
Female, 25 years & over	70.4	69.1	28.1	13.4	57.5	55.4	18.0	8.2
25 to 34 years	19.2	85.2	41.3	20.4	12.6	73.3	25.0	12.0
35 to 44 years	13.4	78.9	32.8	17.0	11.8	64.9	18.9	8.7
45 to 54 years	11.7	70.8	24.1	11.3	12.1	59.4	16.6	7.3
55 to 64 years	11.6	63.2	19.8	8.3	9.7	45.4	16.3	7.6
65 years & over	14.6	42.5	16.1	6.8	11.3	30.1	11.9	5.2
WHITE								
Both sexes, 25 years & over	116.6	71.6	33.1	17.8	98.1	57.4	22.3	11.6
25 to 34 years	32.5	86.9	45.9	24.3	21.9	76.1	31.2	16.6
35 to 44 years	22.7	80.7	38.9	22.5	20.4	66.9	25.0	13.6
45 to 54 years	19.7	72.6	30.0	16.6	21.0	61.2	21.2	10.6
55 to 64 years	19.5	65.8	25.1	12.8	16.7	46.5	18.2	9.1
65 years & over	22.3	44.2	18.4	9.0	18.1	29.9	13.3	6.7
Male, 25 years & over	55.2	72.1	38.0	22.2	46.6	57.2	26.2	15.0
Female, 25 years & over	61.4	71.2	28.0	13.8	51.5	57.6	18.6	8.6
BLACK								
Both sexes, 25 years & over	13.3	52.9	21.2	8.2	10.1	33.7	10.3	4.5
25 to 34 years	4.3	75.9	34.1	11.7	2.7	53.4	15.0	6.1
35 to 44 years	2.8	64.1	23.1	9.1	2.3	41.6	12.2	5.2
45 to 54 years	2.3	44.9	17.2	7.9	2.1	29.1	9.3	3.8
55 to 64 years	1.9	32.5	10.3	4.3	1.5	17.0	6.3	3.8
65 years & over	2.1	17.6	6.5	3.5	1.4	9.0	4.4	2.0
Male, 25 years & over	5.8	53.2	22.1	8.2	4.6	32.4	10.2	4.6
Female, 25 years & over	7.4	52.6	20.5	8.2	5.5	34.8	10.4	4.4

(continued)

EDUCATIONAL ATTAINMENT

Years of School Completed by the Population 25 Years Old & Over, By Age, Sex, Race, & Spanish Origin: March 1981 & 1970

(Numbers in Millions)
(continued)

Age, sex, race, Spanish origin, & region	1981				1970			
		Percent				Percent		
SPANISH ORIGIN*	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More
Both sexes, 25 years & over	6.3	44.5%	18.2%	7.7%	3.9	32.1%	11.0%	4.5%
25 to 34 years	2.4	56.9	24.4	8.8	1.3	44.5	14.6	5.4
35 to 44 years	1.5	48.0	18.2	8.2	1.1	33.6	11.7	5.1
45 to 54 years	1.0	38.7	17.6	9.0	1.2	23.8	8.3	3.8
55 to 64 years	0.8	27.3	9.8	5.1				
65 years & over	0.6	17.0	4.8	2.8	0.4	13.4	5.4	2.5
Male, 25 years & over	3.0	45.5	21.0	9.7	1.9	33.4	13.5	5.9
Female, 25 years & over	3.3	43.6	15.8	5.9	2.1	31.0	8.7	3.2

na = not available
*Persons of Spanish origin may be of any race.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374.

LABOR FORCE, EMPLOYMENT & EARNINGS

Changes in the age composition of the population are reflected in the growing rate of participation in the labor force.

Despite the recession the economy was suffering in that year, the percent of the population which was in the total U.S. labor force (including those in the Armed Forces), rose to 64.3% in 1982 from 64.2% in 1981. However the number of persons employed dropped during this period to 101.2 million due to a decline in employment in the civilian, non-agricultural segment of the economy.

By October 1983, the number of persons holding jobs had risen to 103.6 million according to the Bureau of Labor Statistics. In that same month, the total labor force had also risen, reaching 113.5 million people, representing 64.3% of the population, a figure identical to the 1982 annual average.

Labor Force Profile, 1980 - 1982, October 1982, 1983
(Thousands of persons 16 years of age & over)

	October*		Annual Average		
	1983	1982	1982	1981	1980
Total noninstitutional population, 16 years & older	176,474	174,549	173,939	171,775	169,349
Total labor force**	113,510	112,420	111,872	110,315	108,544
% of population	64.3%	64.4%	64.3%	64.2%	64.1%
Employed, total	103,623	100,844	101,194	102,042	100,907
Resident armed forces	1,695	1,688	1,668	1,645	1,604
Civilian	101,928	99,176	99,526	100,397	99,303
Agricultural	3,202	3,413	3,401	3,368	3,364
Nonagricultural	98,726	95,763	96,125	97,030	95,938
Unemployed, total	9,886	11,576	10,678	8,273	7,637
% of total labor force	8.7%	9.5%	9.5%	7.5%	7.0%

*Seasonally adjusted
**Includes Armed Forces

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, (October 1983)

Between 1977 and 1982, the labor force, including Armed Forces, increased 11.1% reaching 111.9 million people. During the same period domestic employment increased by only 8.1% to 101.2 million workers.

The influx of women into the labor force has had a profound effect on employment in the U.S. Between 1977 and 1982, women increased their share of the labor force from 40.4% to 42.8%. They accounted for 39.9% of total employment in 1977 and 42.9% in 1982. By October 1983, women accounted for 43.0% of labor force and 43.1% of employment.

Employment of the Labor Force, Annual Averages 1977-1982, October 1983
(In Thousands)

	Labor Force			Employment		
Year	Total	Male	Female	Total	Male	Female
1977	100,665	59,959	40,705	93,673	56,291	37,381
1978	103,882	61,151	42,731	97,679	58,010	39,669
1979	106,559	62,215	44,343	100,421	59,096	41,325
1980	108,544	62,932	45,611	100,907	58,665	42,241
1981	110,315	63,486	46,829	102,042	58,909	42,133
1982	111,872	63,979	47,894	101,194	57,800	43,395
October 1983*	113,510	64,690	48,819	103,623	58,912	44,712

*Seasonally adjusted annual rate.

Source: U.S. Bureau of Labor Statistics

LABOR FORCE, EMPLOYMENT & EARNINGS

Although the sharp turnaround in employment is expected to continue into 1984, most analysts believe that many employers are not about to go on a hiring binge. A recent survey by Business Week (12/19/83) indicated that employers are now hiring cautiously in order to preserve productivity gains which were achieved during the recent recession.

Rather than hire more workers, corporations are now relying on overtime to meet the growing demand for their products.

Much of the improvement in the nations job market is directly attributable to the strong growth rate in the services sector of the economy rather than on an overall hiring spree. The unexpectedly low growth rate for the work force, overall, has also contributed to the recent drop in unemployment.

The U.S. Bureau of Labor Statistics had estimated that in 1983 the U.S. labor force would expand by some 1.7 million workers. In reality, there were only one million new entrants into the job market in that year which has led some analysts to warn that unemployment could skyrocket should this missing "army" start to actively seek work.

The aging of the population bodes well for employment overall however. It is almost universally agreed that younger workers (aged 15 to 24) have the most difficulty finding and retaining jobs. In 1980, this group peaked with 42.7 million people; in 1983, it accounted for 39.7 million, although the number of minority youths--who have the most trouble getting jobs--is growing.

Employment Status of the Civilian Noninstitutional Population
By Sex & By Age, October, 1983
(Numbers in Thousands)

	In Civilian Labor Force			Unemployed		Not in Labor Force	
	Number	% of Population In each age group	In Civilian Employment	Number	% of Civilian Labor Force	Number	In school* Number
Men							
16 yrs. & older	62,901	76.0%	57,693	5,208	8.3%	19,900	4,952
16-19	3,982	52.5	3,113	869	21.8	3,603	3,221
20-24	8,459	83.5	7,299	1,161	13.7	1,667	1,221
25-34	18,110	94.1	16,651	1,459	8.1	1,140	409
35-44	13,591	95.4	12,795	796	5.9	657	66
45-54	9,744	91.2	9,229	514	5.3	944	29
55-64	7,125	69.4	6,766	359	5.0	3,143	4
65 & over	1,890	17.8	1,840	50	2.7	8,745	4
Women							
16 yrs. & older	49,140	53.4	44,966	4,174	8.5	42,837	4,743
16-19	3,635	48.2	2,878	757	20.8	3,899	3,170
20-24	7,477	70.3	6,559	918	12.3	3,158	962
25-34	14,078	70.0	12,857	1,221	8.7	6,028	376
35-44	10,488	69.7	9,866	622	5.9	4,567	140
45-54	7,246	63.2	6,849	397	5.5	4,228	51
55-64	4,935	42.0	4,719	216	4.4	6,816	31
65 & older	1,281	8.3	1,237	44	3.4	14,141	14

*Covers only those people who are in school and not in the labor force. Many people in the labor force are, of course, also enrolled in school.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, (November, 1983).

During the 1982-1995 period, the Bureau of Labor Statistics estimates that the number of persons of prime working age (25-54) in the labor force, will grow considerably faster than the total labor force. The Bureau also predicts that there will be a decline in the absolute numbers of young workers reflecting the aging of the baby-boomers and the subsequent sharp decline in the birth rate.

In the Bureau's middle projection (out of a series of three), which assumes that labor force participation of women will accelerate and then taper off, the civilian labor force will reach 131.4 million persons by 1995, 3.8 million more than was predicted for that year by estimates made in December 1980. The labor force is expected to grow 1.6% per year between 1982 and 1990, slowing to 1.0% per year during 1990-95, thus continuing the slow growth which began in the late 1970's. Nearly two-thirds of the growth will be among women; nearly one-fourth will be among Blacks and other groups. (Monthly Labor Review, November 1983)

Civilian Labor Force, by Sex, Age & Race, 1982 & Projections to 1995

	Labor Force (in thousands)			Participation Rate		
	1982	1990	1995	1982	1990	1995
Total labor force	110,204	124,951	131,387	64.0	66.9	67.8
Men	62,450	67,701	69,970	76.6	76.5	76.1
16 to 19	4,470	4,123	4,043	56.7	62.3	62.9
20 to 24	8,604	7,151	6,530	84.9	84.4	84.1
25 to 34	17,793	19,569	18,105	94.7	93.7	93.1
35 to 44	12,781	17,469	19,446	95.3	95.6	95.3
45 to 54	9,784	11,142	13,807	91.2	91.2	91.1
55 to 64	7,174	6,419	6,311	70.2	65.5	64.5
65 & over	1,845	1,828	1,728	17.8	14.9	13.3
Women	47,755	57,250	61,417	52.6	58.3	60.3
16 to 19	4,056	3,778	3,761	51.4	56.8	58.2
20 to 24	7,477	7,035	6,796	69.8	78.1	82.0
25 to 34	13,393	16,804	16,300	68.0	78.1	81.7
35 to 44	9,651	14,974	17,427	68.0	78.6	82.8
45 to 54	7,105	8,718	11,125	61.6	67.1	69.5
55 to 64	4,742	4,888	4,671	41.8	41.5	42.5
65 & over	1,185	1,329	1,337	7.9	7.4	7.0

Source: U.S. Bureau of Labor Statistics

LABOR FORCE, EMPLOYMENT & EARNINGS

Unemployment

Unemployment had been decreasing steadily throughout 1983. The unemployment rate, as well as the number of unemployed, registered an unexpectedly large decline in October 1983, falling to 8.7% or 9,886,000 persons. These totals are about half a percentage point below the September level and about 2 points below December 1982's recessionary high. In October 1983, the number of people unemployed was at its lowest level since March of 1982.

The major beneficiaries of the decreasing rate of unemployment have been those industries which were hardest hit by the recent recession--mining, construction and manufacturing. The unemployment rate for workers in mining, which had continued to rise in the early stages of 1983, fell to 11.3% in October, while joblessness among workers in construction and in manufacturing fell to 15.2% and 9.5%, respectively. The latter two rates were at their lowest levels since the early part of the 1981-82 recession.

According to data from the annual work experience survey reported by the Bureau of Labor Statistics, 26.5 million people experienced unemployment at some time during 1982. This total represents 22% of all persons who were in the labor force for all or part of the year and surpasses the previous peak ratio of 20.2% for 1975. It was well above the 1981 rate of 19.5%.

Of the 26 million persons who were unemployed at some time in 1982, 22.5 million did work at least part of the year. However, 4 million did not work at all; the majority of these looked for work only part of the year and then left the labor market.

Unemployment, Annual Averages 1977-1982 & October 1983

	Total Unemployed		(Males (16 & Older)		Females (16 & Older)	
Year	Number (Thous.)	% of Civilian Labor Force	Number (Thous.)	% of Civilian Labor Force	Number (Thous.)	% of Civilian Labor Force
1977	6,991	6.9	3,667	6.1	3,324	8.2
1978	6,202	6.0	3,142	5.1	3,061	7.2
1979	6,137	5.8	3,120	5.0	3,018	6.8
1980	7,637	7.0	4,267	6.8	3,370	7.4
1981	8,273	7.5	4,577	7.2	3,696	7.9
1982	10,678	9.5	6,179	9.7	4,499	9.4
Oct. 1983*	9,886	8.7	5,778	8.9	4,108	8.4

*Seasonally adjusted annual rate. Preliminary figures showed the unemployment rate in 1983 averaged about 9%.

Source: U.S. Bureau of Labor Statistics.

LABOR FORCE, EMPLOYMENT & EARNINGS

Unemployment

There is a considerable variation in the seriousness of the problem of unemployment within the population. Unemployment is highest among young workers, particularly Blacks ages 16-19 where nearly one out of two is jobless. Overall, 22.5% of those workers aged 16-19 did not have a job in the third quarter of 1983. In the third quarter, unemployment for all civilian workers stood at 9.4% while Whites stood at 8.2%; Blacks, 19.5%; and Hispanics at 12.8%.

Unemployment Rates by Sex, Age & Race, 1980-1982, Seasonally Adjusted Quarterly Averages, 1983
(% of Labor Force Unemployed)

	1983			Annual Averages		
	3rd Qtr.	2nd Qtr.	1st Qtr.	1982	1981	1980
All civilian workers	9.4%	10.1%	10.3%	9.7%	7.6%	7.1%
Men, 20 & over	8.8	9.4	9.7	8.8	6.3	5.9
Women, 20 & over	7.9	8.5	8.9	8.3	6.8	6.4
Both sexes, 16-19	22.5	23.3	22.8	23.2	19.6	17.8
White civilian workers	8.2	8.8	9.1	8.6	6.7	6.3
Men, 20 & over	7.7	8.3	8.5	7.8	5.6	5.3
Women, 20 & over	6.7	7.3	7.7	7.3	5.9	5.6
Both sexes, 16-19	18.0	19.6	18.9	20.4	17.3	15.5
Black civilian workers	19.5	20.7	20.1	18.9	15.6	14.3
Men, 20 & over	18.0	19.8	19.1	17.8	13.5	12.4
Women, 20 & over	16.2	17.0	17.6	15.4	13.4	11.9
Both sexes, 16-19	48.8	47.6	44.4	48.0	41.4	38.5
Hispanic civilian workers	12.8	14.1	15.9	13.8	10.4	9.1

Source: U.S. Bureau of Labor Statistics

During the recent recession, managerial, technical, sales and administrative support personnel did not suffer as badly from unemployment as people in other occupations. However, many occupations which were severely affected by unemployment are now in a healthy stage of recovery.

Unemployment by Occupation & Sex

	Total		Men	Women
	Oct. 1983	Oct. 1982	Oct. 1983	Oct. 1983
Total 16 years & over	8.7%	9.9%	8.3%	8.5%
Managerial & professional specialty	2.7	3.5	2.7	2.6
Executive, administrative & managerial	2.9	3.9	2.8	3.2
Professional specialty	2.4	3.1	2.6	2.3
Technical, sales, & administrative support	5.9	6.6	4.9	6.4
Technicians & related support	4.8	5.4	4.7	5.0
Sales occupations	6.2	6.4	4.3	8.2
Administrative support, incl. clerical	5.9	7.0	6.1	5.8

(continued)

Unemployment

Unemployment by Occupation & Sex

	Total		Men	Women
	Oct. 1983	Oct. 1982	Oct. 1983	Oct. 1983
Service occupations	11.1%	10.8%	10.3%	11.6%
Private household	7.8	4.8	na	7.9
Protective service	7.0	7.9	6.6	9.6
All other service	11.9	11.8	11.6	12.1
Precision, production, craft & repair	8.2	10.3	7.9	10.6
Mechanics & repairers	6.7	6.6	6.6	10.0
Construction trades	10.1	14.1	9.9	18.3
Other precision, production, craft & repair	7.4	9.6	6.7	9.9
Operators, fabricators & laborers	12.6	17.1	12.6	12.5
Machine operators, assemblers & inspectors	12.2	18.8	11.9	12.6
Transportation, & material moving occupations	9.5	11.8	9.5	8.5
Handlers, equipment cleaners, helpers & laborers	16.5	18.9	17.0	14.1
Construction laborers	17.9	25.6	17.4	na
Other handlers equipment cleaners, helpers & laborers	16.2	17.7	16.8	13.6
Farming, forestry & fishing	9.2	7.7	8.8	11.4

na = not available

Source: U.S. Bureau of Labor Statistics

Employment by Industry

Between October 1982 and October 1983, employment in goods-producing rather than service producing jobs showed the fastest growth rate. This is a reversal of the trend over the last several years when services have been the main area of growth. Overall, the number of non-agricultural employees has risen 2.4% from October 1982-October 1983 with the goods producing sector up 3.8% and the service producers up 1.9%.

Employees on Nonagricultural Payrolls in Industry Division 1980-1982, October 1982, 1983 (In thousands)

	October(p)			Annual Averages		
	1983	1982	% Change	1982	1981	1980
Total	91,073	88,938	+ 2.4%	89,596	91,156	90,406
Goods-producing, total	24,167	23,287	+ 3.8	23,907	25,497	25,658
Mining	1,038	1,082	- 4.1	1,143	1,139	1,143
Construction	4,089	3,847	+ 6.3	3,911	4,188	4,346
Manufacturing	19,040	18,358	+ 3.7	18,853	20,170	20,285

(continued)

Employment by Industry

Employees on Nonagricultural Payrolls in Industry Division 1980-1982, October 1982, 1983

(In thousands)
(continued)

	October(p)			Annual Averages		
	1983	1982	% Change	1982	1981	1980
Service-producing	66,906	65,651	+ 1.9%	65,689	65,659	64,748
Transportation & public utilities	5,034	5,033	--	5,081	5,165	5,146
Wholesale trade	5,284	5,237	+ 0.9	5,280	5,358	5,275
Retail trade	15,358	15,107	+ 1.7	15,122	15,189	15,035
Finance, insurance, real estate	5,501	5,350	+ 2.8	5,340	5,298	5,160
Services	20,024	19,144	+ 4.6	19,064	18,619	17,890
Government	15,678	15,780	- 0.6	15,083	16,031	16,241
Federal	2,732	2,742	- 0.4	2,739	2,772	2,866
State & local	12,946	13,038	- 0.7	13,064	13,259	13,375

(p) preliminary, seasonally adjusted.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Between October 1982 and October 1983, only two industry groups failed to register gains in employment: government (both federal and state local) and the construction segments. These two segments registered decreases of 0.6% and 4.1%, respectively, during the twelve month period. By contrast, between 1981 and 1982, when the recession was at its peak, seven of the ten measured non-agricultural industries measured recorded declines in the numbers of employees.

Overall, there were 91.1 million persons on non-agricultural payrolls in October 1983, an increase of 2.4%. This compares to a decline of 1.7% in the number of persons employed between 1981 and 1982.

The influx of women into the labor force has changed the complexion of employment immensely since 1977. Females, as a percent of total employees has risen in every measured industry between 1977 and 1982 with the exception of two groups. In the apparel and allied products industry, women as a percent of total fell from 81.7% in 1977 to 80.6% in 1982, while in the leather and leather products group the percent fell from 60.1 to 59.8.

Employment by Industry

Employment By Industry, Annual Averages, 1977-1982

	Employees (thousands)		Females - % of Total Employees	
	1982	1977	1982	1977
Mining	1,143	813	11.9%	8.0%
Construction	3,911	3,851	9.6	7.9
Manufacturing, total	18,853	19,682	31.9	29.9
Durable goods	11,100	11,597	25.6	22.9
Non-durable goods	7,753	8,086	40.9	39.9
Food & kindred products	1,638	1,711	30.3	28.0
Textile mill products	750	910	47.6	46.6
Apparel & other textile products	1,164	1,304	80.6	81.7
Paper & allied products	662	692	23.1	21.8
Printing & publishing	1,269	1,141	40.5	37.1
Chemicals & allied products	1,079	1,074	26.0	22.8
Rubber & misc. plastic products	701	714	34.6	33.2
Leather & leather products	221	255	59.8	60.1
Transportation & public utilities	5,081	4,713	26.3	22.3
Wholesale & retail trade	20,401	18,516	44.3	41.9
Wholesale trade	5,280	4,708	26.4	24.3
Retail trade	15,122	13,808	50.5	47.9
Finance, insurance & real estate	5,340	4,467	59.9	56.2
Services	19,064	15,303	59.4	56.9
Government	15,803	15,127	52.1	45.7

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings,
July, 1983

Full-time & Part-time Workers

The U.S. Bureau of Labor Statistics reports that of the 59 million men 20 years old and over in the civilian labor force in the 3rd quarter of 1983, nearly 95% were considered full-time workers. The comparable figure for women 20 years and older was 80.1% during this same period.

It must be noted that the Department of Labor counts unemployed persons as either full-time or part-time by the kind of employment they are seeking.

Overall, in the third quarter of 1983, almost 86% of the civilian labor force was considered to be full-time employees.

LABOR FORCE, EMPLOYMENT & EARNINGS

Full-time & Part-time Workers

Number & Distribution of Full & Part Time Labor Force, 1983
(Numbers in thousands)

	Number*			Percent		
	3rd Qtr.	2nd Qtr.	1st Qtr.	3rd Qtr.	2nd Qtr.	1st Qtr.
Total civilian labor force	112,268	111,156	110,528	100.0%	100.0%	100.0%
Full-time	96,021	95,539	94,941	85.6	86.0	85.9
Men, 20 & over	55,873	55,547	54,990	49.8	50.0	49.8
Women, 20 & over	36,023	35,674	35,611	32.1	32.1	32.2
Both sexes, 16-19	4,124	4,318	4,340	3.7	3.9	3.9
Part-time	16,199	15,600	15,589	14.4	14.0	14.1
Men, 20 & over	3,128	3,054	3,095	2.8	2.7	2.8
Women, 20 & over	8,936	8,674	8,602	8.0	7.8	7.8
Both sexes, 16-19	4,134	3,872	3,892	3.7	3.5	3.5

*Includes unemployeds allocated by whether seeking full- or part-time work.

Source: U. S. Bureau of Labor Statistics.

Earnings

In 1982, the U.S. Department of Commerce reported that earnings of domestic workers reached $1,826.7 billion, an increase of 4.4% over 1981 and 14.4% above the total registered in 1980. Better than 85% of this total came from wage and salary disbursements in 1982, while proprietors' income accounted for 5.9%.

Earnings By Industry, 1980-1982
(Millions of Dollars)

	Earnings			Percent Change	
	1982	1981	1980	1982/81	1982/80
Total Earnings	$1,826,710	$1,748,818	$1,595,620	+ 4.4%	+14.4%
Farm	33,474	39,825	31,237	-15.9	+ 7.2
Non-farm	1,793,326	1,708,993	1,564,383	+ 4.9	+14.6
Private	1,483,890	1,422,184	1,301,733	+ 4.3	+14.0
Agricultural	7,469	7,137	6,562	+ 4.7	+13.8
Mining	37,301	35,476	28,593	+ 5.1	+30.5
Construction	96,361	97,092	94,633	- 0.8	+ 1.8
Manufacturing	446,316	448,373	412,122	- 0.5	+ 8.3
Nondurable goods	164,501	158,510	145,826	+ 3.8	+12.8
Durable goods	281,815	289,863	266,296	- 2.8	+ 5.8
Transportation & public utilities	144,589	136,243	123,758	+ 6.1	+16.8
Wholesale trade	125,832	119,699	108,900	+ 5.1	+15.5
Retail trade	171,801	164,150	153,067	+ 4.7	+12.2
Finance, insurance & real estate	112,550	101,305	92,627	+11.1	+21.5
Services	341,671	312,709	281,471	+ 9.3	+21.4
Government & government enterprises	309,346	286,809	262,650	+ 7.9	+17.8

Source: U.S. Department of Commerce,
Bureau of Economic Analysis

Earnings

The U.S. Bureau of Labor Statistics reported that in 1982 the average woman earned only 59% of the amount earned by her male counterpart in that year. There are a wide variety of reasons for the disparity in earnings between both men and women including career preferences for traditional, lower-paying "female" occupations, disproportional lower years of education in mathematics, science and engineering among women and outright discrimination against women.

Analysts expect that the gap between men's and women's wages will shrink as time goes on but agree that for the foreseeable future, the gap will not close. Upwardly mobile young women, with a college education and career ambitions, are becoming a powerful force pushing up women's median wages. Wages are also expected to rise as more women enter higher paying occupations. However, it is believed that as women continue to drop out of the labor force to have children or fail to attain proper job skills, the gap will continue to remain open.

A 1982 survey by Market Opinion Research indicates that 46% of adult women think the ideal lifestyle would be to stay at home while their children are young, and to combine jobs with homemaking throughout the rest of their careers.

Median Weekly Earnings of Full-Time Wage & Salary Workers by Occupation & Sex
(Second Quarter 1983)

	Total	Men	Women
Managerial & professional specialty	$440	$537	$362
Executive, administrative & managerial	459	550	343
Professional specialty	431	524	372
Technical, sales & administrative support	286	392	248
Technicians & related support	367	430	295
Sales occupations	319	394	210
Administrative support, incl. clerical	266	367	249
Service occupations	212	260	180
Private household	120	na	118
Protective service	343	356	240
Service, exc. private household & protective	198	227	183
Precision production, craft & repair	385	398	250
Mechanics & repairers	377	379	349
Construction trades	381	384	na
Other precision production, craft & repair	399	425	236
Operators, fabricators & laborers	275	312	210
Machine operators, assemblers & inspectors	259	329	207
Transportation & material moving occupations	333	336	268
Handlers, equipment cleaners, helpers & laborers	242	248	216
Farming, forestry & fishing	198	203	159

na = not available

Source: U.S. Bureau of Labor Statistics

Earnings

There is a wide difference in earnings between Whites, Blacks and Hispanics. For both males and females, the median wage levels for White workers was significantly higher than for Blacks and those of Spanish origin.

In 1981 the median wage/salary income for males was $15,201, compared with $12,092 in 1978. White males had a median income of $15,797; Blacks attained $10,797 and Spanish-origin males were at the $10,648 level. Females, on the other hand, had a median $7,438 wage/salary income in 1981 compared with $5,358 in 1978. Again Whites had a significantly higher level than other races ($7,418 versus $7,341 for Blacks and $6,744 for Spanish-origin workers).

Size of Wage/Salary Income of Persons 15 Years Old & Over by Race, 1981

	Men				Women			
	Total	White	Black	Spanish Origin	Total	White	Black	Spanish Origin
Total with wage/salary income	60,544	53,518	5,609	3,480	49,646	42,956	5,482	2,452
Percent	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $5,000	20.1	19.6	24.6	21.5	37.5	37.7	36.6	38.1
$5,000-$9,999	13.7	12.7	22.0	23.9	25.4	25.0	28.2	31.7
$10,000-$14,999	15.5	15.0	20.3	20.6	20.0	20.2	20.2	19.1
$15,000-$19,999	14.5	14.5	14.4	14.0	10.1	10.2	9.5	6.6
$20,000-$24,999	13.4	13.9	8.9	9.5	4.4	4.4	3.6	3.0
$25,000-$34,999	14.3	15.1	8.3	8.1	2.1	2.2	1.6	1.3
$35,000-$49,999	5.7	6.2	1.2	1.9	0.3	0.3	0.3	0.2
$50,000 & over	2.8	3.0	0.3	0.5	0.1	0.1	--	--
Median income	$15,201	$15,797	$10,648	$10,852	$7,438	$7,418	$7,341	$6,744
Mean income	16,875	17,441	11,744	12,485	8,411	8,431	8,056	7,490
Total with no wage/salary income (thousands)	23,414	19,768	3,004	1,007	42,583	36,635	5,028	2,502

Source: U.S. Bureau of the Census,
Current Population Reports,
P-60, No. 137

Although the unemployment rate is falling much faster than in most previous recoveries, and is already well below the level the Administration and most economists expected, there is little sign of an impending wage explosion as has happened with other recoveries. Evidence of this is that in the third quarter of 1983, unit labor costs rose a scant 1.1%.

As 1984 gets under way, most economists expect that labor costs will continue to increase at only a moderate rate of 5%-5½%. There are several reasons for this, including deregulation, increased foreign competition due to an unusually strong U.S. dollar and long-lasting concessions which were given by unions during the recession.

Earnings

The trend towards multi-earner households, a new development in the 1970's, has continued. The number of households with more than one earner increased from 41.6% of all households in 1980 to 43.9% in 1981.

Obviously, as the number of earners in a household increases total earnings of the household rise dramatically. As this trend towards more earners per household is expected to continue, the median earnings per household is also expected to rise dramatically in the long term.

Number of Earners in U.S. Households, 1981

	Number (Thousands)	Percent of Total	Median Earnings	Mean Earnings
Total households	83,527	100.0%	$20,412	$23,144
Family households	61,019	73.1	22,172	24,916
No earners	8,416	10.1	--	--
One earner	18,445	22.1	13,590	16,768
Two earners	25,396	30.4	24,739	26,768
Three earners	5,841	7.0	31,375	34,040
Four or more earners	2,921	3.5	38,777	41,734
Non-family households	22,508	26.9	13,874	16,380
No earners	8,797	10.5	--	--
One earner	11,212	13.4	12,337	14,277
Two earners	2,244	2.7	22,521	25,152
Three earners	214	0.3	27,246	30,545
Four or more earners	41	--	na	na

Source: U.S. Bureau of the Census
Current Population Reports,
Series P-60, No. 137.

In 1982 median income for 2-earner families (including total money income) and for 3-earner families (which together account for 23% of all families) dropped 2.6% on a constant dollar basis compared with 1981.

Comparison of Median Family Money Income in 1982/1981 by Number of Earners

	1982	1981 Constant $	1981 Current $	% Change In Real Money Income
All families	$23,433	$23,761	$22,388	- 1.4%
Number of earners:*				
Total	23,495	23,808	22,433	- 1.3
No earners	9,911	9,987	9,410	- 0.8
1 earner	18,913	18,707	17,626	+ 1.1
2 earners	28,073	28,507	26,860	- 1.5
3 earners	35,798	36,401	34,298	- 1.7
4 or more earners	44,409	44,563	41,989	- 0.3

Source: U.S. Bureau of the Census, Current Population Reports, Series P-60, No. 140 (July 1983)

INCOME

Personal

The following table outlines personal income and spending in current dollars, as well as constant dollars (eliminating the effects of inflation), for the years 1981 and 1982, and the annual rate averaged in the first three quarters of 1983.

Personal Income & Its Disposition, 1981-1983
(Billions of Dollars)

	1983*	1982(r)	1981(r)	Percent Change 1983/82	Percent Change 1982/81
Personal income	$2,710.9	$2,578.6	$2,435.0	+ 5.1%	+ 5.9%
Less: Personal tax & nontax payments	404.8	402.1	387.4	+ 0.7	+ 3.8
Equals: Disposable personal income	2,306.1	2,176.5	2,047.6	+ 5.9	+ 6.3
Less: Personal outlays	2,198.1	2,051.1	1,912.4	+ 7.2	+ 7.2
Personal consumption expends.	2,135.5	1,991.9	1,857.2	+ 7.2	+ 7.2
Durable goods**	273.5	244.5	236.1	+11.9	+ 3.6
Nondurable goods	798.5	761.0	733.9	+ 4.9	+ 3.7
Services	1,036.6	986.4	887.1	+ 7.8	+11.2
Interest paid by consumers to business	62.6	58.1	54.3	+ 5.7	+ 7.0
Personal transfer payments to foreigners (net)		1.1	0.9		+22.2
Equals: Personal saving	108.0	125.4	135.3	-13.9	- 7.3
Addenda					
Disposable personal income:					
Total, bils. of 1972 dollars	1,086.8	1,060.2	1,054.7	+ 2.5	- 0.5
Per capita:					
Current dollars	9,854	9,377	8,906	+ 5.1	+ 5.3
1972 dollars	4,640	4,567	4,587	+ 1.6	- 0.4
Population (millions) (av. incl. Armed Forces abroad)	234.0	232.1	229.9	+ 0.8	+ 1.0
Personal saving as a % of disposable personal income	4.7	5.8	6.6	-19.0	- 0.8 pts.
Personal consumption expenditures					
Total, bils. of 1972 dollars	1,005.5	970.2	956.8	+ 3.6	+ 1.4
Durable goods**	154.0	139.8	141.2	+10.1	- 0.1
Nondurable goods	374.5	364.2	362.5	+ 2.8	+ 0.5
Services	479.0	466.2	453.1	+ 2.7	+ 2.9

(r) revised
* annual rate in the first 3 quarters of 1983
**Durable goods is defined as goods which has useful lifetime of three years or more; nondurable goods, less than three years.

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

INCOME

Personal

A turnaround in the economy began in 1982, triggered in the view of some economists by the sharp declines in interest rates that began in the summer. As the cost of money came down the stock market revived. In turn, this enabled many people to purchase new cars and new homes, and recovery in these key industries sparked an upturn in other sectors, leading to a much improved business and consumer market climate. The rate of recovery gathered momentum in March 1983, sparked by increased consumer spending.

Disposable personal income in 1982 amounted to $2,176.5 billion, up 6.3% compared with 1981. However, on a constant dollar basis, eliminating the effects of inflation, total disposable personal income in 1982 registered a decline of 0.5%.

Compared with the same period in 1982, real per capita disposable personal income in the first quarter of 1983 rose 2.0%; in the second quarter 2.6%; third quarter, 5.6%.

According to the Bureau of Economic Analysis, personal income in October at a seasonally adjusted annual rate rose 1.1% over the September rate; in November, however, there was a slowdown in the gain. The rise in the annual rate for November was only 0.7%, less than expected in view of the increase in non-farm payroll employment in November 1983. This figure is subject to revision.

The Administration's supply-side program has not produced the hoped-for increase in savings. From 6.6% annually in 1981, personal savings as a percent of take-home pay fell to 5.8% in 1982, and sank to 4.0% in the second quarter of 1983--the lowest quarterly rate in 33 years. There was, however, a rise to a 4.7% rate in the third quarter of 1983.

Some shifts in the pattern covering sources of income will be noted in 1983. Based on the first nine months' data, the BEA indicates that because interest rates are down the share of personal income represented by interest income will be lower than the 14.2% reported in 1982; and transfer payments (Social Security, Unemployment and other benefits) will have a larger share--up from 14.2% in 1982.

Distribution of Personal Income by Source, 1981-1983

	1983 Jan.-Sept. Rate	1982	1981(r)
Total personal income	100.0%	100.0%	100.0%
Wage & salary disbursement	60.7	60.8	61.3
Other labor income*	6.3	6.1	5.9
Proprietors' income			
Farm**	0.8	0.8	1.2
Nonfarm**	3.9	3.4	3.7
Rental income	2.0	1.9	1.7
Personal dividend income	2.6	2.6	2.6
Personal interest income	13.3	14.2	14.0
Transfer payments (Social Security, Unemployment & other benefits)	14.8	14.5	13.8

(continued)

INCOME

Personal

Distribution of Personal Income by Source, 1981--1983
(continued)

	1983 Jan.-Sept. Rate	1982	1981(r)
Less: Personal contributions for social insurance	4.4%	4.3%	4.3%

(r) revised

* Employer contributions to private pension, health and welfare funds; workmen's compensation, directors' fees and a few minor items.

**With inventory valuation and capital consumption adjustments.

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

According to the March 1983 Current Population Survey conducted by the Bureau of the Census, 94% of the males age 15 and over in the U.S. and 86% of the females of the same age had some money income in 1982. As was the case in 1980 and 1981, the median income for men declined while the median income for women increased in 1982; however, median income for males was almost two and half times that for women. Compared with 1981, the median income for men was down 2.4%, while that of women rose 1.6%.

Men and women in the 65-and-over age group showed a significant increase in median incomes compared with 1981 while the medians for other age groups were flat or registered a decline.

According to a recent Census Bureau Report (America In Transition: An Aging Society, P-23, No. 128) Social Security benefits reach 91% of the elderly population. They comprise 50% of the total money income of half of these people.

Total Money Income of Persons 15 Years Old & Over in the U.S.
1979, 1982

	Total		Male		Female	
	1982	1979	1982	1979	1982	1979
Number of persons (thous.)*	178,000	171,861	84,955	83,958	93,145	92,228
Number with income (thous.)	162,227	158,050	79,722	78,129	82,505	79,921
Percent with income:	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $6,000	37.4	43.9	23.3	27.4	50.8	60.3
$ 6,000-$9,999	15.5	17.3	13.3	15.5	17.5	19.1
$10,000-$14,999	15.6	15.2	16.0	15.8	15.1	12.7
$15,000-$24,999	18.1	16.0	23.6	25.5	12.6	6.7
Median income (dollars)	$ 9,143	$ 7,254	$13,950	$11,779	$ 5,887	$4,352
Mean income (dollars)	$12,709	$10,121	$17,381	$14,311	$ 8,195	$6,026
Year-round, full-time workers:						
% of civilian income recipients	39.6%	41.1%	50.9%	55.0%	28.9%	27.8%
Median income (dollars)	$17,927	$14,544	$21,655	$17,479	$13,663	$10,531
Mean income (dollars)	$21,209	$17,021	$24,809	$19,935	$15,142	$11,448

*Excludes inmates of institutions.

Source: U.S. Bureau of the Census, Current Population Reports, Consumer Income Series P-60, No. 140 (September 1983).

INCOME

Personal

Selected Characteristics of Persons 15 Years Old & Over With Money Income, 1982
By Sex

	Male				Female			
	No. With Income (thous.)	Median Income	% Change, Median Income 1982/81 Current $	1982 $	No. With Income (thous.)	Median Income	% Change, Median Income 1982/81 Current $	1982 $
Total number, U.S.	79,722	$13,950	+ 3.5	- 2.4	82,505	$ 5,887	+ 7.9	+ 1.6
By race:								
White	70,477	14,748	+ 3.2	- 2.8	71,624	5,967	+ 8.1	+ 1.9
Black	7,290	8,838	+ 4.0	- 2.0	8,921	5,263	+ 7.3	+ 1.1
Spanish origin (any race)	4,092	10,471	+ 2.6	- 3.3	3,832	5,140	+ 1.6	- 4.3
By region:								
Northeast	17,016	14,544	+ 4.2	- 1.9	18,314	5,975	+ 8.6	+ 2.3
North Central	20,522	14,590	+ 2.8	- 3.1	21,202	5,612	+ 6.7	+ 0.5
South	26,422	18,820	+ 5.0	- 1.0	27,165	5,678	+ 8.8	+ 2.5
West	15,761	14,619	+ 0.1	- 5.7	15,825	6,605	+10.6	+ 4.2
Relationship to family								
Householder (Head):								
In families	67,372	14,205	+ 2.7	- 3.3	67,037	5,283	+ 7.8	+ 1.6
Householder	49,318	18,090	+ 3.2	- 2.8	11,233	7,878	+ 5.3	- 0.7
Husband/wife of householder	2,092	14,838	+ 0.5	- 5.3	42,216	5,539	+ 9.9	+ 3.6
Other relative	15,962	3,954	+ 0.9	- 4.9	13,588	3,298	+ 2.6	- 3.3
In unrelated subfamilies	120	7,363	+ 9.0	+ 2.7	391	6,659	+23.2	+16.1
Unrelated individuals*	12,229	12,806	+ 6.0	- 0.1	15,077	8,250	+ 8.9	+ 2.6
Age:								
15 to 19 years	6,348	1,786	- 1.7	- 7.3	5,970	1,697	- 0.9	- 6.7
20 to 24 years	9,648	7,743	- 2.2	- 7.8	9,571	5,506	+ 1.4	- 4.4
25 to 34 years	18,833	16,416	+ 2.0	- 3.9	17,973	7,972	+ 4.9	- 1.1
35 to 44 years	13,852	21,649	+ 2.5	- 3.4	13,291	7,851	+ 6.6	+ 0.4
45 to 54 years	10,501	21,543	+ 2.5	- 3.4	10,169	7,502	+ 6.7	+ 0.5
55 to 64 years	10,096	17,828	+ 2.7	- 3.3	10,543	5,907	+ 9.9	+ 3.5
65 years & over	10,443	9,188	+ 12.4	+ 5.9	14,989	5,365	+12.8	+ 6.3
		Med. Earnings						
Total with earnings	64,730	15,373	+ 2.1**	- 3.8**	51,820	7,686	+ 6.4	+ 0.3
Occupation group:								
Exec., admin., mgrl.	7,616	26,119	+ 13.3	+ 6.8	3,783	14,592	+17.0	+10.2
Prof. specialty	7,113	24,784	+ 6.4	+ 0.2	6,854	13,696	+12.5	+ 6.0
Tech./related support	1,718	19,735	- 2.5	- 8.1	1,571	12,035	+ 3.9	- 2.1
Sales	6,662	16,943	- 7.0	-12.4	6,726	4,776	+11.6	+ 5.1
Admin. support, clerical	3,741	15,252	+ 8.5	+ 2.2	14,798	9,897	+ 8.2	+ 1.9
Precision prod., craft	12,983	16,629	+ 1.7	- 4.2	1,034	9,300	+10.4	+ 4.0
Mach. oper., assemblers, inspectors	5,257	14,267	- 0.5	- 6.2	4,239	7,763	+ 2.4	- 3.5
Transp., material moving	4,539	14,318	+ 0.8	- 5.1	403	6,305	+ 5.4	- 0.7
Handlers, clnrs., laborers	4,484	6,862	- 5.0	-10.5	882	5,952	- 9.5	-14.7
Service workers	6,738	6,524	+ 3.8	- 2.2	10,832	3,424	+ 8.1	+ 1.8
Farming, fishing, etc.	3,879	3,682	+ 8.7	+ 2.4	697	1,796	+17.0	+10.2

* Unrelated individuals are persons 15 years old and over not living with any relatives, and may be in a one-person household, living with unrelated individuals or in group quarters.

**Comparisons between 1982 and 1981 should be used with caution due to a change in occupational classifications in 1982.

Source: U.S. Bureau of the Census, Current Population Reports, Consumer Income, Series P-60, No. 140 (September 1983).

INCOME

Personal

In 1982 per capita disposable income ranged from $13,312 in Alaska and $11,604 in Connecticut to less than $7,000 in Mississippi. The U.S. average was $9,375, gaining 5.4% over the 1981 average of $8,897.

In the 1959-1982 period, the fastest growth in per capita disposable income on a regional basis was reported for the Southeast, which had an annual growth rate of 7.84%, compared with the national average of 7.19%. In terms of total disposable income, the fastest growth in the 1959-1982 period was reported for the Southwest, which registered an average growth rate of 10.12%, sparked by an 11.22% growth rate in Arizona. An even sharper annual rate of growth on a state basis was reported for booming Florida--averaging 11.28%.

According to an analysis by Business Week (November 28, 1983) in the first seven months of 1983 total personal income in the U.S. was up 5.4%, reflecting the economic recovery. Disposable income, too, was helped by the tax cut in July and by the lower inflation rate.

Income growth in 1983, according to this analysis, on a regional basis was up the sharpest in the South Atlantic Region (+8.4%). Florida, Georgia and North Carolina, which account for more than half of this region's total income, are among the top states in income growth in 1983. Florida's prosperity has been sparked by tourism and a resurgent housing market; North Carolina's new high-tech industries are benefiting from the upturn in business equipment spending.

In 1979-1981 the average annual rate of growth of personal income in metropolitan (metro) areas exceeded that in nonmetropolitan (nonmetro) areas, 11.5% compared with 10.3%. This was in contrast to the pattern in the 1970's. Estimates are not yet available for 1982, but in view of the weakness in farming, mining and lumber, industries which are generally concentrated in nonmetro areas, it is likely that faster metro growth in income continued in that year, according to the Bureau of Economic Analysis.

(It should be noted that BEA and Census Bureau data on income differ due to the fact that the former measures personal income which includes nonmoney income, such as payments in kind, the rental value of owner-occupied housing and noncash benefits such as food stamps; the Census Bureau measures money income, which is the sum of earnings, Social Security, public assistance payments, dividends, interest, rent and other money income.)

INCOME

Personal

The top 15 Metropolitan Areas ranked by 1981 per capita income, as reported by the BEA were as follows:

	1981	1980	% Increase
Midland, TX	$16,467	$13,921	18.3
Bridgeport-Stamford-Norwalk-Danbury, CT	15,697	13,965	12.4
Anchorage, AK	15,563	14,134	10.1
Casper, WY	14,979	13,882	7.9
San Francisco-Oakland, CA	14,416	12,969	11.2
Washington, DC-MD-VA	14,177	12,900	9.9
Nassau-Suffolk, NY	13,676	12,249	11.6
San Jose, CA	13,529	12,265	10.3
West Palm Beach-Boca Raton, FL	13,337	11,947	11.6
Houston, TX	13,303	11,798	12.8
Lafayette, LA	13,284	10,972	21.1
Reno, NV	13,255	10,311	7.7
Anaheim-Santa Ana-Garden Grove, CA	13,027	11,808	10.3
Newark, NJ	13,001	11,702	11.1
Seattle-Everett, WA	12,841	11,787	8.9

Total & Per Capita Disposable Personal Income By States & Regions, 1979, 1982
(Including Income From All Sources Less Personal Tax
Payments & Specified Non-Tax Payments*)

	Total (Mil. of $) 1982	1979	Av. Annual Growth 1959-1982	Per Capita 1982	1979	Av. Annual Growth 1959-1982
United States	2,170,556	1,643,846	8.46%	$ 9,375	$ 7,320	7.19%
New England	125,532	93,111	7.96	10,048	7,542	7.12
Conn.	36,590	11,594	8.10	11,604	8,687	7.06
Maine	8,869	6,812	7.84	7,825	6,055	7.05
Mass.	58,330	43,188	7.71	10,090	7,516	7.14
New Hamp.	8,790	6,396	9.44	9,245	7,014	7.24
Rhode Island	8,761	6,699	7.63	9,140	7,003	7.11
Vermont	4,192	3,086	8.71	8,122	6,102	7.35
Mideast	428,242	325,227	7.47	10,085	7,678	6.98
Dela.	5,692	4,408	8.00	9,452	7,361	6.55
Dist. of Columbia	7,623	5,821	6.59	12,075	8,878	7.45
Maryland	42,704	32,238	8.92	10,012	7,633	7.37
New Jersey	82,362	61,216	8.07	11,073	8,303	7.08
New York	179,611	135,603	7.05	10,171	7,690	6.79
Pennsylvania	110,250	85,942	7.34	9,292	7,238	7.09
Great Lakes	387,129	318,672	7.49	9,309	7,658	6.81
Ill.	116,755	94,316	7.39	10,198	8,257	6.75
Ind.	46,320	39,052	7.61	8,467	7,133	6.81
Mich.	83,934	71,681	7.59	9,214	7,750	6.85
Ohio	96,992	79,654	7.28	8,988	7,376	6.77
Wisconsin	43,129	33,969	7.99	9,050	7,280	7.04

(continued)

Personal

Total & Per Capita Disposable Personal Income By States & Regions, 1979, 1982
(Including Income From All Sources Less Personal Tax
Payments & Specified Non-Tax Payments*)
(continued)

	Total (Mil. of $)		Av. Annual Growth	Per Capita		Av. Annual Growth
	1982	1979	1959-1982	1982	1979	1959-1982
Plains	158,390	124,928	8.02%	$ 9,133	$ 7,307	7.40%
Iowa	26,540	21,770	7.71	9,136	7,464	7.42
Kansas	23,906	18,588	8.11	9,929	7,919	7.60
Minn.	38,466	29,835	8.46	9,307	7,388	7.50
Mo.	42,624	33,977	7.66	8,610	6,949	6.96
Neb.	14,576	11,535	8.03	9,193	7,374	7.44
No. Dak.	6,327	4,607	8.76	9,443	7,065	8.38
So. Dak.	5,952	4,615	8.43	8,619	6,698	8.27
Southeast	443,525	327,997	9.50	8,186	6,310	7.84
Ala.	28,930	22,544	8.64	7,338	5,826	7.67
Ark.	16,860	13,361	9.24	7,358	5,888	7.99
Fla.	98,250	66,748	11.28	9,433	7,048	7.60
Ga.	45,490	33,499	9.50	8,067	6,214	7.72
Ky.	28,005	22,499	8.60	7,637	6,102	7.66
La.	38,105	26,401	9.51	8,735	6,378	8.06
Miss.	17,003	13,232	8.91	6,666	5,276	8.08
No. Car.	46,335	35,281	9.14	7,699	6,081	7.72
So. Car.	23,060	17,498	9.45	7,200	5,668	7.98
Tenn.	35,842	27,743	8.98	7,707	6,120	7.67
Va.	51,045	37,719	9.42	9,296	7,084	7.86
West Va.	14,599	11,740	7.78	7,496	6,054	7.56
Southeast	213,502	147,840	10.12	9,415	7,116	7.80
Ariz.	24,899	18,153	11.22	8,705	6,880	7.33
New Mex.	10,817	8,016	8.95	7,958	6,260	7.12
Okla.	30,476	20,684	9.63	9,593	6,964	8.07
Texas	147,311	100,987	10.17	9,641	7,272	7.87
Rocky Mountain	62,644	44,881	9.58	9,124	6,970	7.29
Colo.	31,536	21,535	10.31	10,358	7,558	7.57
Idaho	7,468	5,939	8.79	7,736	6,368	6.98
Montana	6,616	5,161	7.87	8,261	6,540	7.03
Utah	11,805	8,536	9.46	7,599	6,028	6.74
Wyoming	5,218	3,710	9.66	10,402	8,211	7.53
Far West	335,829	250,100	9.06	10,334	8,170	6.86
Calif.	261,996	193,140	9.02	10,597	8,305	6.82
Nevada	8,919	6,274	12.10	10,126	8,199	6.63
Oregon	22,874	18,558	8.79	8,636	7,198	6.83
Wash.	42,040	32,130	9.00	9,903	8,007	7.08
Alaska	5,828	3,686	--	13,312	9,136	--
Hawaii	9,936	7,402	--	9,999	7,791	--

*Non-tax payments include passport fees, fines and penalties, donations, tuition and fees paid to government operated schools and hospitals.

Source: U.S. Bureau of Economic Analysis,
Survey of Current Business (August 1983)

INCOME

Personal

Regional differences in per capita personal income are narrowing, according to the BEA. Regions that had relatively low incomes are rising toward the U.S. average, while those that had high incomes are falling toward it.

Per capita personal income in the Southeast in 1929 was less than 55% of the U.S. average; by 1982 it was 86% of the U.S. average. On the other hand, per capita personal income in the Mideast had dropped from 139% of the U.S. average in 1929 to 105% in 1982.

Wealthy Individuals

According to the Internal Revenue Service, preliminary estimates of the personal wealth of individuals in 1981 showed that there were approximately 4.5 million people in the U.S. with gross assets of $300,000 or more. These "wealthy individuals", who comprised only 2.0% of the nation's population, had net worth (total assests less liabilities) of nearly $2.4 trillion. In contrast, during 1976 fewer than 2 million had a comparable level of gross assets.

An estimated 350,000 to 500,000 individuals were reported to have a net worth of $1 million or more in 1981, up from 180,000 in 1976. Much of the increase in number may be due to inflation and to the rapid increase in the value of real estate.

Of the 4.5 million top wealth holders in 1981 (assets of $300,000 or more) 65% were men; however, the average net worth of female top wealth holders was considerably higher--$637,000 vs. $471,000 for the men.

Profile of the Top Wealth Holders, 1981
(Numbers of people in thousands; money amounts in millions of $)

	Men		Women	
	Number	Assets	Number	Assets
Total	2,950.5	$1,707,993	1,571.2	$1,095,806
Age *				
Under 50	1,417.8	679,001	451.9	274,053
50 - 65	968.2	604,199	640.7	461,153
65 & over	517.2	403,644	438.7	336,932
Assets greater than $500,000	1,237.7	1,216.9	600.9	737.6
By type of asset:	100.0%	100.0%	100.0%	100.0%
Cash	98.4	7.4	93.1	10.5
Corporate stock	82.6	25.4	75.7	23.6
Bonds	35.9	4.9	48.6	7.8
Life insur. equity	91.4	1.8	46.8	0.2
Notes & mortgages	51.6	4.5	39.6	2.6
Real estate	94.2	32.6	79.3	26.5
Noncorporate bus.	49.4	7.0	36.0	4.9
Other assets	97.4	16.3	95.7	23.7

* Age unknown note separately reported.

Source: Dept. of Treasury, Internal Revenue
Service, SOI Bulletin, Summer 1983

INCOME

Household

According to The Conference Board, average household income in 1981 amounted to $22,650 for the U.S. as a whole, but was higher in the Pacific States.

Households & Average Income by Census Division
(Households as of 1982; incomes for 1981)

	Number of Households (Thousands)	Average Household Income
Total	83,528	$ 22,650
New England	4,627	23,780
Middle Atlantic	13,374	22,849
East North Central	14,843	23,229
West North Central	6,411	21,426
South Atlantic	13,958	21,575
East South Central	5,128	18,901
West South Central	8,839	22,696
Mountain	4,205	23,580
Pacific	12,142	24,410

Source: The Conference Board

The Census Bureau has released data on the number and percentage of households by before- and after-tax income in 1980.

Distribution of Households By Before- & After-Tax Income, 1980

	Before Taxes		After Taxes	
	Number (000)	Percent	Number (000)	Percent
Total	82,368	100.0%	82,368	100.0%
Income:				
Under $15,000	34,935	42.4	42,602	51.7
$15,000-$19,999	10,964	13.3	14,415	17.5
$20,000-$24,999	10,017	12.2	10,565	12.8
$25,000-$34,999	13,588	16.4	10,106	12.2
$35,000-$44,999	6,706	8.2	3,124	3.8
$45,000-$59,999	3,887	4.7	1,176	1.4
$60,000-$74,999	1,222	1.5	301	0.4
$75,000 & over	1,051	1.3	80	0.1
Median income	$17,710		$14,551	
Mean income (average)	21,063		16,272	
Income per household member	7,720		5,964	

Source: Bureau of the Census, Current Population Reports, Special Studies Series P-23, No. 126 (August 1983)

INCOME

Household

Before taxes, the highest 20% of the U.S. households based on income had a 44.2% share of aggregate income; after taxes, a 40.6% share.

Percent of Aggregate Income Received By Each Fifth of Households Before & After Taxes, 1980

	Before Taxes	After Taxes
Total household income	100.0%	100.0%
Lowest fifth	4.1	4.9
Second fifth	10.2	11.6
Third fifth	16.8	17.9
Fourth fifth	24.8	25.1
Highest fifth	44.2	40.6
Top 5%	16.5	14.1
Aggregate income (billions)	$1,734.9	$1,340.3

Source: Bureau of the Census, Current Population Reports, Series P-23, No. 126

During the 1970's the nation's household population grew at a rate of less than 1% a year, but real disposable income grew by better than 3%. The number of households with annual earnings of $35,000 or more (measured in constant 1982 dollars) rose some two and a half times faster than the nation's total household count.

During the 1980's the number of households in the upper brackets will grow even faster, as the baby boom generation reaches the age of peak earning power. By contrast, in the preceding 10 years the young adult population just entering the labor force and relatively low incomes was growing the fastest.

The Consumer Research Center of The Conference Board and the U.S. Bureau of the Census have issued a report on a joint study of the discretionary income market--households where spendable income exceeded the average spendable income of "similar" households by 30% or more. The amount by which it exceeded that level was defined as discretionary income. "Similar" households were considered to be units of identical size, of about the same age, and located in the same type of communities. According to this definition, slightly over 25 million households (21% of the total) had some discretionary income in 1980. Total discretionary income was $193 billion --representing about 14% of the total after-tax income of the nation's households and 28% of the total for households with at least some discretionary income.

INCOME

Household

Total Households & Households With Discretionary Income, 1980
By Age of Head

				Households With Discretionary Income			
	Total Hhlds. (thous.)	After Tax Income Aggregate (billions)	After Tax Income Average	Total No. (thous.)	% of All Hhlds.	Spendable Discret. Income Aggregate (billions)	Spendable Discret. Income Average
Total	82,368	$1,340.4	$16,272	25,292	30.7%	$193.3	$7,644
Age of Householder							
Under 25 years	6,443	74.6	11,584	1,170	18.2	5.4	4,612
25 to 29 years	9,514	142.7	15,002	2,633	27.7	14.2	5,383
30 to 34 years	9,639	163.5	16,959	3,017	31.3	19.4	6,433
35 to 39 years	7,969	150.5	18,884	2,466	30.9	18.9	7,646
40 to 44 years	6,494	132.0	20,334	2,175	33.5	18.3	8,429
45 to 49 years	6,209	133.9	21,566	2,216	35.7	20.3	9,177
50 to 54 years	6,486	132.5	20,423	2,455	37.8	21.6	8,810
55 to 59 years	6,742	128.9	19,123	2,662	39.5	23.9	8,963
60 to 64 years	5,962	96.0	16,098	2,111	35.4	17.8	8,428
65 years & over	16,912	185.7	10,981	4,388	25.9	33.6	7,646

Source: The Conference Board & the U.S. Bureau of the Census,
A Marketer's Guide To Discretionary Income (Nov. 1983)

In 1982, according to the Census Bureau, 74.9 million households (89% of the total) received at least one type of noncash benefit--including means-tested and non-means-tested benefits. A total of 14.6 million households received one or more of the following means-tested benefits: food stamps, free or reduced-price school lunches, public or other subsidized rental housing and Medicaid. Households receiving non-means-tested benefits (Medicare, regular-price school lunches, employer- or union-provided pension plans, and employer- or union-provided group health plans) numbered 69.4 million in 1982.

Families & Unrelated Individuals

Median family income in 1982 was lower for the third consecutive year. However, the decline was significantly less than in the two previous years, according to results of the March 1983 Current Population Survey (Census Bureau). In 1982 the median family income was $23,430, an increase of 4.7% over 1981. After adjusting for the 6.1% increase in consumer prices, median family income declined 1.4%. This compares with the 3.5% decline in real terms in 1980-81, and the 5.5% decline in 1979-80.

Families in large metropolitan areas had their real median income decline by 3.2% in 1982, while smaller metro areas and nonmetro areas showed no change. The 1982 median income for all married-couple families was $26,020 and $30,340 for those with wives in the paid labor force--both down 2.2% from 1981. However, median income for male-household families with no wives present ($20,140) and female-householder families with no husbands present ($11,480) were unchanged. Median income for two-earner families also declined (down 1.5%) in real terms in 1982.

INCOME

Families & Unrelated Individuals

Families & Unrelated Individuals by Total Money Income, 1982
(Numbers in Thousands)

	Families			Unrelated Individuals		
	Total*	White	Black	Total*	White	Black
Total number	61,393	53,407	6,530	27,908	24,300	3,051
Money Income						
Under $10,000	10,205	7,444	2,476	13,980	11,740	1,929
$10,000 - $14,999	7,653	6,461	1,023	4,902	4,330	488
$15,000 - $19,999	7,459	6,572	733	3,423	3,045	307
$20,000 - $24,999	7,575	6,720	698	2,301	2,073	185
$25,000 - $34,999	11,985	10,825	921	2,106	1,972	94
$35,000 - $39,000	4,242	3,864	256	367	338	27
$40,000 - $49,999	5,573	5,183	251	394	384	8
$50,000 - $74,999	4,837	4,552	150	299	292	3
$75,000 & over	1,866	1,782	23	137	125	10
Meidan income	$23,433	$24,603	$13,599	$9,978	$10,414	$6,861
Mean income	27,391	28,603	17,259	12,960	13,465	9,360
% Distrib. of Aggregate Income						
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Lowest fifth	4.7	5.2	3.9	3.8	4.0	3.0
2nd fifth	11.2	11.6	9.1	9.0	9.1	8.3
3rd fifth	17.1	17.2	15.9	15.2	15.3	14.5
4th fifth	24.3	24.1	25.8	24.3	24.3	24.9
Highest fifth	42.7	41.9	45.3	19.0	18.7	18.9

* Total includes races not separately listed. Race is based on that of householder.

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-60, No. 140)

Selected Characteristics of Families: Number & Median Income, 1981, 1982
(Current Dollar Basis)

	1982		1981	Percent Change in
	Number (thous.)	Median Income	Median Income	Median Income 1982/81
All families	61,393	$23,433	$22,388	+ 4.7
Nonfarm	59,777	23,585	22,554	+ 4.6
Farm	1,617	18,756	17,082	+ 9.8
Inside Metro. Areas	41,145	25,423	24,478	+ 3.9
Outside Metro. Areas	20,248	20,100	19,225	+ 4.6

(continued)

Families & Unrelated Individuals

Selected Characteristics of Families: Number & Median Income, 1981, 1982
(Current Dollar Basis)
(continued)

	1982 Number (thous.)	1982 Median Income	1981 Median Income	Percent Change in Median Income 1982/81
Region:				
Northeast	12,975	$24,918	$23,706	+ 5.1
North Central	15,721	24,219	23,118	+ 4.8
South	21,111	21,500	20,582	+ 4.5
West	11,586	24,624	23,873	+ 3.1
Size of family				
2 persons	24,392	19,816	18,542	+ 6.9
3 persons	14,189	24,186	23,401	+ 3.4
4 persons	13,039	27,619	26,274	+ 5.1
5 persons	5,970	27,144	26,258	+ 3.4
6 persons	2,329	27,012	16,725	+ 1.1
7 persons or more	1,475	23,569	24,323	- 3.1

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-60, No. 140).

Family Income, 1979-1982 In Constant (1982) Dollars

	1982	1981	1980	1979
Total families (thous.)	61,393	61,019	60,309	59,550
Percent	100.0%	100.0%	100.0%	100.0%
Under $10,000	16.6	16.1	15.4	13.5
$10,000 - $14,999	12.4	12.7	11.7	11.6
$15,000 - $24,999	24.4	24.0	25.1	22.7
$25,000 - $49,999	35.5	36.4	37.8	39.7
$50,000 & over	10.9	10.7	11.0	12.4
Median income	$23,433	$23,761	$24,626	$26,047
Mean income	27,391	27,422	28,083	29,676

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-60, No. 140)

OVERVIEW OF CONSUMERS' FINANCIAL POSITION

Based on Federal Reserve Board data, the real net worth of the nation's consumers by mid-1983 was up 13.5% compared with mid 1982 data, according to an analysis by Goldman Sachs Economics. Total financial assets of consumers rose to 8.9 times their total liabilities (excluding mortgages) in the second quarter of 1983, marking a record high. Mortgages are excluded from liabilities since the value of homes is not included in financial assets.

An overall view of consumer finances as of the second quarter 1983 compared with 1982 and 1979 is covered below.

The Consumer Balance Sheet, 1979, 1982, 2nd Quarter 1983
(Billions of Dollars)

	1983 (2nd Qtr.)	1982	1979
Assets:			
Checkable deposits & currency	$ 326.2	$ 307.3	$ 250.4
Time & savings accounts	1,580.3	1,468.8	1,163.6
Money market fund shares	164.6	206.6	45.2
Open market paper	45.4	41.6	45.3
Savings bonds	69.7	68.3	79.9
Total liquid assets	2,186.3	2,092.7	1,584.4
Total real liquid assets*	734.9	713.5	686.6
Corporate stock (market value)	1,548.7	1,322.3	915.2
All U.S. Treasury securities	316.7	308.6	184.9
Other long-term securities	397.4	380.0	290.8
Total long-term securities	2,262.8	2,011.0	1,390.8
Total financial assets, incl. insurance, pension reserves, misc.	5,871.0	5,384.4	3,861.2
Total real financial assets*	1,973.3	1,835.8	1,673.7
Real financial assets plus real value of 1-4 family residences	2,933.1	2,796.1	2,686.8
Liabilities & net worth:			
Consumer credit	440.9	430.7	383.4
Other liabilities (excl. mortgages)	219.0	209.3	143.6
Financial net worth, excl. mortgages	5,211.1	4,744.4	3,334.3
Real financial net worth, excl. mortgages*	1,751.6	1,617.6	1,445.3
Real financial net worth & real net worth of 1-4 family residences*	2,325.3	2,202.5	2,081.6

* Adjusted for rise in Consumer Price Index.

Source: Goldman Sachs (October 1983)

A small decrease was anticipated in consumer real net worth in the third quarter of 1983. However, as the year progressed there were strong indications of a rise in consumer confidence and willingness to spend. In October 1983 consumer installment debt rose by a record $4.89 billion, according to the Federal Reserve Board. This covers short and medium term loans, not mortgages.

OVERVIEW OF CONSUMERS' FINANCIAL POSITION

Much of the rise was due to a surge in car sales, particularly imports. On a seasonally adjusted basis, U.S. consumers had $371.56 billion in installment debt outstanding at the end of October 1983, 10.4% above the total a year earlier.

CONSUMER PRICES

Moderation in the rate of inflation contributed to the consumer's ability and willingness to step up spending in 1983. Cost-of-living increases as measured by the Consumer Price Index from December of one year through December of the next showed a 3.8% gain in 1983 compared with 3.9% in 1982, a rise of 8.9% in 1981, a 12.4% gain in 1980. The December 1983 reading was the lowest reported by the BLS since 1972.

Consumer Price Index For All Urban Consumers
Annual Averages, 1981, 1982, 1983
(1967 = 100)

	1983	1982	1981
All items	298.4	289.1	272.4
Food & beverages	284.4	278.2	267.3
Housing	323.1	314.7	293.5
Fuel & other utilities	370.3	350.8	319.2
Household furnishings & operation	238.5	233.2	221.3
Apparel & upkeep	196.5	191.8	186.9
Men's & boys' apparel	188.9	183.9	177.5
Women's & girls'	161.9	159.1	157.5
Infants' & toddlers'	282.7	269.4	259.8
Footwear	206.9	205.5	200.4
Other apparel	214.9	211.6	213.5
Transportation	298.4	291.5	280.0
Medical care	357.3	328.7	294.5
Entertainment	246.0	235.8	221.4
Other goods & services	288.3	259.9	235.7

Source: U.S. Bureau of Labor Statistics

PERSONAL CONSUMPTION EXPENDITURES

Spending by consumers for Christmas 1983 was at a much brisker pace than had been expected and retailers ended the year on a very high note. In November 1983 the seasonally adjusted annual rate of personal consumption expenditures rose a strong 1.1% over the October level, and the total for the year is expected to reach $2,150 billion--8% ahead of the 1982 total. However, gains in spending are outpacing gains in personal income, and consumers will not be able to sustain the course prevailing at the end of 1983. Analysts look for increases in personal consumption expenditures next year to slow down to a 4% annual rate. Trends in interest rates will of course be a factor in consumer spending plans.

PERSONAL CONSUMPTION EXPENDITURES

Spending for all nondurable goods (seasonally adjusted annual rate) rose 1% in November 1983 to $833.2 billion. This compares with a rise in October of 0.9%; in September, 0.5%. Spending for durable goods climbed 1.8% in November, to an adjusted annual rate of $295.6 billion, following a 2.5% gain in October.

Personal Consumption Expenditures, 1979-1982, Annual Rate 1983 3rd Quarter

	Billions of Dollars				% Change	
	3rd Qtr. 1983 Rate	1982	1981	1979	1983/ 1982	1982/ 1981
Personal consumption expends., total	$2,186.5	$1,991.9	$1,857.2	$1,507.2	+ 9.8%	+ 7.2%
Selected groups:						
Durable goods	284.2	244.5	236.1	213.4	+16.2	+ 3.5
Motor vehicles/parts	137.2	109.9	101.6	96.6	+24.8	+ 8.2
Furniture/hhld. equip.	102.8	93.5	93.3	81.8	+ 9.9	+ 0.2
Nondurable goods	818.7	761.0	733.9	600.0	+ 7.6	+ 3.7
Food	428.8	396.9	375.9	311.6	+ 8.0	+ 5.6
Clothing & shoes	125.5	119.0	115.3	99.1	+ 5.5	+ 3.2
Gasoline & oil	93.4	91.5	94.6	66.6	+ 2.1	- 3.3
Services	1,083.6	986.4	887.1	693.7	+ 9.8	+11.2

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

In the third quarter of 1983 personal consumption expenditures, including total spending for all goods and services, represented 65% of total gross national product. This compares with a 64.8% share in 1982; 62.3% in 1979.

Per capita personal consumption expenditures in terms of a constant dollar registered the following real growth in 1983 compared with 1982: first quarter, up 1.7%; second quarter, up 3.3%; third quarter, up about 4.0%.

The Bureau of Labor Statistics has prepared trend projections on the economy for the 1990's. In terms of a constant 1972 dollar, there were three sets of projections on the average annual rate of change expected in personal consumption expenditures by 1990 compared with 1982: high: +3.7%; moderate: + 3.1%; low: + 2.7%. (Monthly Labor Review, November 1983). Spending for durable goods and services is generally expected to grow at a faster pace than spending for nondurables.

PERSONAL CONSUMPTION EXPENDITURES

The Bureau of Economic Analysis, Department of Commerce, has compiled detailed information on personal consumption expenditures by major product categories. This covers the value at retail of goods (new and used) reaching the consumer through any channel--including retail outlets, premiums, direct sales by manufacturers and wholesalers, etc.

Personal Consumption Expenditures For Selected Product Categories, 1979, 1981, 1982
(Millions of Current Dollars)

	1982	1981(r)	1979	% Change 1982/1981
Total disposable personal income	$2,176,537	$2,047,621	$1,650,155	+ 8.3%
Total personal consumption expenditures	1,991,861	1,857,180	1,507,165	+ 7.2
Durable goods	244,459	236,142	213,441	+ 3.5
Nondurable goods	761,014	733,903	600,028	+ 3.7
Services	986,388	887,135	693,696	+11.2
Selected Expenditures				
Food & non-alcoholic beverages, total*	347,840	328,443	272,246	+ 5.9
Food for off-premise consumption**	282,595	270,285	223,360	+ 4.5
Purchased meals and beverages**	107,152	98,921	82,475	+ 8.3
Tobacco products	24,960	23,044	19,258	+ 8.3
Alcoholic beverages	49,087	47,431	38,696	+ 3.5
Toilet articles & preparations	16,898	16,115	13,600	+ 4.8
Drug preparation & sundries (not including products dispensed by doctors, hospitals, etc.)	19,945	18,765	15,754	+ 6.3
Clothing & accessories (not including standard military clothing or jewelry, or footwear, but including luggage)	98,637	95,778	82,744	+ 3.0
Women's & children's	64,908	62,779	54,088	+ 3.4
Men's & boys'	33,729	32,999	28,656	+ 2.2
Footwear, total	20,276	19,395	16,291	+ 4.5
Women's & children's (estimated)	12,227	11,637	9,400	+ 5.1
Men's & boys' (estimated)	8,049	7,758	6,891	+ 3.7
Jewelry & watches	12,186	12,172	9,537	- 0.1

(continued)

Personal Consumption Expenditures For Selected Product Categories, 1979, 1981, 1982

(Millions of Current Dollars)
(continued)

	1982	1981(r)	1979	% Change 1982/1981
Home furnishings, household supplies	$126,553	$125,020	$108,364	+ 1.2%
Furniture & bedding	19,151	19,853	18,236	- 3.5
Major appliances, electric housewares	19,557	19,508	16,837	+ 0.2
Dinner & tableware, glassware, utensils	9,554	9,388	7,888	+ 1.8
Other durable house furnishings#	20,642	20,192	17,978	+ 2.2
Floor coverings	nr	nr	6,971	--
Semi-durable house furnishings##	10,697	10,453	8,926	+ 2.3
Home entertainment (TV, radios, records, musical instruments, etc.)	24,604	24,359	20,860	+ 1.0
SUB-TOTAL: Home furnishings, excl. misc. household supplies, etc.	104,205	103,753	90,725	+ 0.4
Misc. household supplies, cleaning prepartions, paper products, etc.	22,348	21,267	17,639	+ 5.1

(r) = revised (nr) = not reported

* Includes expenditures not separately shown, such as the value of food furnished to government and commercial employees, etc.

**Includes alcoholic beverages, and to this extent the figure on consumption of alcoholic beverages shown separately is duplicated.

# Principal furnishings included in "other durable house furnishings" are floor coverings, blankets, comforters, pillows, picture frames, mirrors, art products, lamps, clocks, writing equipment, hand and power tools, garden tools are also included.

##Consists mainly of textile home furnishings except where elsewhere classified, including piece goods for home furnishings. Also includes lamp shades, brooms, and brushes.

Note: Columns may not add to totals shown due to rounding of figures and/or expenditure categories included in totals but not separately reported.

Source: Based on reports from the Bureau of Economic Analysis, U.S. Department of Commerce.

When measured in a constant (1972) dollar, total personal consumption expenditures in 1982 were up only 1.4% compared with 1981. For the year 1982 a gain of 2.7% was chalked up in real terms compared with 1981.

Personal Consumption Expenditures By Major Type of Product In Constant Dollars
(Billions of 1972 Dollars)

	1982	1981	1979	% Change 1982/1981
Personal consumption expends., total	$970.2	$956.8	$927.6	+ 1.4%
Durable goods	139.8	141.2	147.2	- 1.0
Motor vehicles, parts	57.4	56.0	62.6	+ 2.5
Furniture & household equip.	59.7	61.7	60.4	- 3.2
Nondurable goods	364.2	362.5	353.1	+ 0.5
Food	184.0	181.8	176.1	+ 1.2
Clothing & shoes	84.4	83.2	76.7	+ 1.4
Gasoline & oil	25.6	25.2	27.4	+ 1.6
Services	466.2	453.1	427.3	+ 2.9
Housing	171.3	166.7	154.8	+ 2.8
Household operation	63.5	63.0	60.1	+ 0.8

Source: U.S. Department of Commerce,
Bureau of Economic Analysis

An ongoing Consumer Expenditure Survey is now being compiled by the Bureau of Labor Statistics to provide a continuous flow of data on the buying habits of American consumers and to provide a basis for future revisions of the Consumer Price Index. Data on the Diary (not the personal interview) component of this program covering data collected during 1980 and 1981 were reported by the BLS in September 1983, updating information on consumer purchases of food alcoholic beverages, tobacco products, personal care products and drugs, housekeeping supplies and energy. This updates data last collected by the BLS in 1972-1973.

Additional details on the Diary survey component as well as the Interview component (which will cover other expenditures) will be released by the BLS in 1984.

Average Weekly Expenditures of Urban Consumer Units Diary Survey, 1972-73, 1980-81 & Change in Consumer Price Index

	1980-1981	1972-1973	% Change In CPI 1972-73 to 1980-81
Number of consumer units in universe (thousands)	70,040	59,159	--
Average size of consumer unit	2.6	2.8	--
Children under 18	0.7	0.9	--
Average weekly expenditures (selected information)			
Food at home, total	$34.15	$23.79	84.6%
Food away from home	16.35	9.32	95.7
Alcoholic beverages	5.20	2.32	56.4
Tobacco prods., supplies	2.89	2.19	53.9
Personal care prods., supplies	3.95	2.92	76.7
Nonprescription drugs, supplies	1.62	1.19	66.8
Housekeeping supplies	4.16	2.62	115.4
Energy, total	32.22	13.12	198.2

Source: U.S. Bureau of Labor Statistics, Consumer Expenditure Survey: Diary Survey, 1980-81 (Bulletin 2172, Sept. 1983)

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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HOUSEHOLD FURNITURE & BEDDING

Market Trends

Following a strong 1983, the near-term outlook for the household furniture and bedding market seems bright. According to the national accounting firm of Seidman & Seidman, 1983 was the best year for the furniture industry since 1979. Through the first 10 months of 1983, according to the National Association of Furniture Manufacturers reports, the value of furniture shipments was ahead of the same 1982 period by 18%, with new orders up 24%. In an October 1983 forecast, the NAFM predicted that furniture shipments would rise 19.1% for all of 1983 and an additional 16.7% in 1984.

The 1983 industry recovery, after the value of shipments had fallen to a five-year low in 1982, has been fueled by the rise in both housing starts and housing sales. Sales of new homes surged 52% over 1982 to 625,000 units while housing resales in 1983 were an estimated 2.7 million, 36% higher than the previous year. Furniture sales have also been propelled by an increase in disposable income as well as a decline in interest rates. On a constant 1972 dollar basis, disposable personal income gained 2.5% (based on the first three quarters of 1983) in 1983 over 1982. The University of Michigan's Survey of Consumer Attitudes found that 27% of consumers were not reluctant to incur new debt in the third quarter of 1983, more than twice the 12% recorded one year earlier.

During the five-year period ending in 1988, the value of household furniture and bedding shipments is expected to increase at a "real" (inflation-removed) rate of 4.0% annually, according to the 1984 U.S. Industrial Outlook (U.S. Bureau of Industrial Economics). Furniture categories for which growth is anticipated to be exceptionally high include downsized furniture (to meet the needs of consumers with smaller homes and rooms), multifunctional products, the furniture designed to house new electronic devices and home computers.

Approximately 13.3 million bedding units were sold in 1983, of which 2 million, or 15%, were waterbeds. By 1985, according to the Waterbed Manufacturers Association, they will represent about one-fifth of all bedding purchases. Retail sales of these beds were up 17.5% in 1982 to $1.5 billion.

GENERAL INDUSTRY STATISTICS

AT THE MANUFACTURER LEVEL

The 1981 Annual Survey of Manufactures, compiled by the U.S. Bureau of the Census, provides the latest available information on household furniture and bedding at the manufacturer level. The ASM is based on a sample of manufacturers and is conducted between the complete census of manufactures conducted every five years. It is adjusted for comparability with the most recent census covering the year 1977.

In 1983, the total value of industry shipments (including both primary and secondary products and miscellaneous receipts) in the household furniture and bedding industry reached $14.2 billion, up 13.6% over the estimated 1982 shipment value of $12.5 billion, according to the 1984 U.S. Industrial Outlook published by the Bureau of Industrial Economics.

GENERAL INDUSTRY STATISTICS

Profile of the U.S. Furniture & Bedding Manufacturing Industry
1979, 1980, 1981

Wood Household Furniture (SIC 2511*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	2,106	2,109	2,155	- 0.1%
Number with 20 or more employees	828	799	856	+ 3.6
Employees, total (thous.)	134.7	138.1	140.1	- 2.5
Production workers (thous.)	116.8	119.5	122.1	- 2.3
Payroll (mil. $)	$1,478.1	$1,370.0	$1,334.3	+ 7.9
Value added by manufacture# (mil. $)	2,912.7	2,708.2	2,670.7	+ 7.5
Value of industry shipments## (mil. $)	5,321.7	5,008.5	4,942.3	+ 6.2
Capital expenditures, new (mil. $)	125.1	136.8	153.8	- 8.5

Upholstered Household Furniture (SIC 2512*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	1,176	1,220	1,303	- 3.6%
Number with 20 or more employees	647	679	707	- 4.7
Employees, total (thous.)	83.2	89.0	95.0	- 6.5
Production workers (thous.)	70.3	75.0	81.4	- 6.3
Payroll (mil. $)	$ 959.3	$ 959.2	$ 951.9	--
Value added by manufacture# (mil. $)	1,829.9	1,739.4	1,747.6	+ 8.8
Value of industry shipments## (mil. $)	3,860.0	3,721.6	3,641.6	+ 3.7
Capital expenditures, new (mil. $)	84.6	72.3	67.1	+17.0

Metal Household Furniture (SIC 2514*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	401	412	422	- 2.7%
Number with 20 or more employees	214	219	216	- 2.3
Employees, total (thous.)	29.8	31.6	34.4	- 5.7
Production workers (thous.)	24.4	26.2	28.0	- 6.9
Payroll (mil. $)	$ 358.5	$ 345.3	$ 352.1	+ 3.8
Value added by manufacture# (mil. $)	789.0	739.9	772.1	+ 6.6
Value of industry shipments## (mil. $)	1,546.5	1,467.7	1,506.9	+ 5.4
Capital expenditures, new (mil. $)	27.9	34.1	29.9	-18.2

(continued)

GENERAL INDUSTRY STATISTICS

Profile of the U.S. Furniture & Bedding Manufacturing Industry
1979, 1980, 1981
(continued)

Mattresses & Bedsprings (SIC 2515*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	822	856	883	- 4.0%
Number with 20 or more employees	335	344	370	- 2.6
Employees, total (thous.)	28.3	27.8	28.8	+ 1.8
Production workers (thous.)	21.1	20.8	21.7	+ 1.4
Payroll (mil. $)	$ 367.9	$ 341.3	$ 333.2	+ 7.8
Value added by manufacture# (mil. $)	1,027.1	894.6	810.6	+14.8
Value of industry shipments## (mil. $)	2,171.8	1,934.8	1,760.1	+12.2
Capital expenditures, new (mil. $)	36.3	23.0	20.5	+57.9

Wood TV & Radio Cabinets (SIC 2517*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	74	80	78	- 7.5%
Number with 20 or more employees	39	45	44	-13.3
Employees, total (thous.)	7.0	7.5	8.4	- 6.7
Production workers (thous.)	6.1	6.5	7.1	- 6.1
Payroll (mil. $)	$ 84.7	$ 80.5	$ 81.4	+ 5.2
Value added by manufacture# (mil. $)	149.6	139.9	123.7	+ 6.9
Value of industry shipments## (mil. $)	291.9	279.0	261.7	+ 4.6
Capital expenditures, new (mil. $)	4.8	3.8	6.4	+26.3

Household Furniture Not Elsewhere Classified (SIC 2519*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	na
Number of establishments, total**	174	178	169	- 2.2%
Number with 20 or more employees	72	73	71	- 1.4
Employees, total (thous.)	9.2	9.1	8.8	+ 1.1
Production workers (thous.)	7.7	7.6	7.6	+ 1.3
Payroll (mil. $)	$ 121.6	$ 109.2	$ 99.0	+11.3
Value added by manufacture# (mil. $)	199.6	179.5	139.4	+11.2
Value of industry shipments## (mil. $)	466.5	412.3	353.8	+13.1
Capital expenditures, new (mil. $)	17.6	18.1	13.2	- 2.8

(see footnotes on next page)

GENERAL INDUSTRY STATISTICS

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2511 comprises establishments primarily engaged in manufacturing wood household furniture used in dwellings, not including upholstered pieces, but including infants' and children's wood furniture and wood outdoor furniture.

SIC 2512 comprises establishments primarily manufacturing upholstered furniture on wood frames.

SIC 2514 covers establishments primarily engaged in manufacturing metal household furniture, padded or plain, but not dual-purpose sleep furniture.

SIC 2515 comprises manufacturers of mattresses (innerspring, box, etc.) and dual-purpose sleep furniture (studio couches, sofa beds, chair beds). This industry is referred to as the "Bedding Industry" in this Fact File.

SIC 2517 comprises manufacturers of wood TV, radio, phonograph and sewing machine cabinets.

SIC 2519 comprises establishments primarily manufacturing reed, rattan, and other wicker furniture, plastic and fiberglass household furniture and cabinets, and household furniture not elsewhere classified.

**Each business location is counted as a separate establishment. Data includes only establishments with payrolls, as reported in County Business Patterns.

#Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

##Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes, and includes both products described as primary to the industry as well as secondary products and miscellaneous receipts. This value should be clearly distinguished from the total value of furniture and bedding manufactured by all producers, including those classified in other industries. This total product value is shown in the table on page 15.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures 1979,
1980, 1981.

GENERAL INDUSTRY STATISTICS

Over the 11 year period ended in 1983, the value of household furniture and bedding shipments has declined by -0.2% annually on a constant (1972) dollar basis. However, the shipment value measured in constant dollars, is expected to rise 9.5% in 1984 compared with 1983, according to the Bureau of Industrial Economics.

Value of Furniture & Bedding Industry Shipments on a Constant 1972 Dollar Basis

	Constant 1972 Dollars	
	Compound Annual Growth Rate 1972-1983	% Change 1984/1983
Household furniture (SIC 251)	- 0.2%	+ 9.5%
Wood household furniture (SIC 2511)	- 1.0	+ 10.1
Upholstered household furniture (SIC 2512)	+ 0.8	+ 9.1
Metal household furniture (SIC 2514)	- 1.3	+ 9.3
Mattresses & bedsprings (SIC 2515)	+ 1.7	+ 9.8
Wood TV & radio cabinets (SIC 2517)	- 7.6	+ 8.8
Household furniture, n.e.c. (SIC 2519)	+ 2.3	+ 7.8

Source: U.S. Bureau of Industrial Economics
1984 U.S. Industrial Outlook

Employment & Earnings

An average of 123,000 workers (of which 106,000 were production workers) were employed in the wood household furniture industry in the first 10 months of 1983, 1.2% higher than the average number employed in the 1982 calendar year. Production workers' average weekly salary in the January to October 1983 period was 11.1% higher, at $214.65, than in 1982.

The number of employees in the upholstered household furniture industry rose 5.9% to an average of 88,200 in the 1983 time frame and production workers increased in average numbers by 6.3% over 1982. Wages for production workers gained 11.2% to a weekly average of $247.02.

GENERAL INDUSTRY STATISTICS

Employment & Earnings in the Furniture & Bedding Industry
1981, 1982 & January-October 1983

	Jan.-Oct. 1983 Average	Annual Averages 1982	1981	% Change 10 months 1983/ 12 months 1982
Wood household furniture (SIC 2511)				
Total employees (thous.)	123.0	121.5	133.5	+ 1.2%
Production workers (thous.)	106.0	104.3	115.7	+ 1.6
Avg. weekly earnings	$ 214.65	$ 193.14	$ 194.69	+ 11.1
Avg. hourly earnings	5.55	5.35	5.07	+ 3.7
Avg. weekly hours	38.6	36.1	38.4	+ 6.9
Upholstered household furniture (SIC 2512)				
Total employees (thous.)	88.2	83.3	89.4	+ 5.9
Production workers (thous.)	71.2	67.0	73.1	+ 6.3
Avg. weekly earnings	$ 247.02	$ 222.14	$ 217.56	+ 11.2
Avg. hourly earnings	6.48	6.24	5.88	+ 3.8
Avg. weekly hours	38.1	35.6	37.0	+ 7.0
Metal household furniture (SIC 2514)				
Total employees (thous.)	27.2	26.0	30.5	+ 4.6
Production workers (thous.)	22.9	20.7	24.8	+ 10.6
Avg. weekly earnings	$ 253.58	$ 238.07	$ 221.94	+ 6.5
Avg. hourly earnings	6.29	6.12	5.72	+ 2.8
Avg. weekly hours	40.3	38.9	38.8	+ 3.6
Mattresses & bedsprings (SIC 2515)				
Total employees (thous.)	28.4	27.8	30.4	+ 2.2
Production workers (thous.)	21.5	20.8	23.3	+ 3.4
Avg. weekly earnings	$ 270.63	$ 235.06	$ 224.48	+ 15.1
Avg. hourly earnings	6.94	6.44	6.10	+ 7.8
Avg. weekly hours	39.0	36.5	36.8	+ 6.8

Source: Bureau of Labor Statistics, *Employment & Earnings*.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Number of Manufacturing Establishments in the Furniture & Bedding Industry By Employment Size, 1981

(Includes only establishments with payrolls)

	SIC 251 Household Furniture	SIC 2511 Wood Household Furniture	SIC 2512 Upholstered Household Furniture	SIC 2514 Metal Household Furniture
Total establishments	4,790	2,106	1,176	401
Number by employment size:				
Under 20 employees	2,653	1,278	529	187
20-49 employees	912	350	240	77
50-99 employees	514	174	174	42
100-499 employees	620	249	216	86
500 employees or more	91	55	17	9

	SIC 2515 Mattresses & Bedsprings	SIC 2517 Wood TV & Radio Cabinets	SIC 2519 Household Furniture, n.e.c.
Total establishments	822	74	174
Number by employment size:			
Under 20 employees	487	35	102
20-49 employees	191	19	34
50-99 employees	99	9	15
100-499 employees	44	4	21
500 employees or more	1	7	2

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census, County Business Patterns 1981.

Concentration Ratios in Furniture & Bedding Manufacturing, 1977

	Value of Shipments* (Mil. $)	Percent Accounted For By			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Wood household furniture, total	$3,890.7	14%	22%	37%	54%
Wood living room, library, family room & den furniture, exc. sewing cabinets	859.8	15	25	46	69
Wood dining room & kitchen furniture, exc. cabinets	962.3	23	36	59	81
Wood bedroom furniture	1,290.3	21	34	56	80
Infants' & children's wood furniture	118.8	44	70	94	100
Wood outdoor furniture & unpainted, unassembled wood furniture	185.8	37	55	75	93
Upholstered wood household furniture, total	2,735.7	14	23	34	49

(continued)

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios in Furniture & Bedding Manufacturing, 1977
(continued)

	Value of Shipments* (Mil. $)	Percent Accounted For By			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Metal household furniture, total	$1,231.2	13%	22%	47%	61%
Metal household dining & dinette furniture	319.1	39	55	80	98
Metal kitchen furniture	73.4	52	74	96	100
Metal porch, lawn, outdoor & casual furniture	275.9	33	51	81	99
Other metal household furniture	445.5	18	31	57	87
Wood TV, radio, stereo & sewing machine cabinets, total	312.8	47	73	88	97
Household furniture, n.e.c.	281.8	27	38	61	82
Mattresses & bedsprings, total	1,481.5	18	28	39	54
Innerspring mattresses, exc. crib size	492.6	29	38	51	70
All other mattresses	108.3	43	52	66	83
Bedsprings	360.6	30	43	56	74
Convertible sofas	302.6	22	36	58	77
Other dual-purpose sleep furniture	31.8	43	59	82	97

*Value of shipments from all producers, regardless of industry classification.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Subject Series MC77-SR-9.

As part of the 1978 Annual Survey of Manufactures, the publication Statistics for States, SMSA's, Counties & Cities (discontinued in subsequent surveys) contained information on household furniture industry shipments by leading states. Plants in North Carolina accounted for 22.6% of total industry dollar shipments in 1978.

In 1978, total shipments from plants classified in the wood TV and radio cabinets industry (including secondary products and miscellaneous receipts) were valued at $340.7 million. Almost 40% of this total was shipped from plants in Indiana, with a shipment value of $136.0 million. The value of shipments of the mattresses and bedsprings industry was $1.5 billion in 1978. Ohio plants accounted for $129.6 million, or 8.6%, and Texas factories represented 8.0% of the total.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Value of Shipments in the Household Furniture Industry
By Leading States, 1978

	Employment (Thous.)	Value Added by Manufacturer (Mil. $)	[illegible]e of Industry Shipments (Mil. $)
Household furniture (SIC 251)	316.5	$ 5,920.1	$ 11,916.2
North Carolina	74.8	1,385.8	2,695.4
California	37.2	774.8	1,629.3
Virginia	24.2	427.9	809.0
Tennessee	18.6	310.7	635.4
Mississippi	13.8	248.6	532.8
Indiana	14.6	255.1	528.9
Illinois	11.5	235.3	489.8
New York	11.6	231.7	425.8
Pennsylvania	9.7	209.4	411.1
Texas	11.4	202.7	406.9
Ohio	9.0	189.1	398.0
Wood household furniture (SIC 2511)	147.0	2,586.8	4,864.4
North Carolina	42.6	779.1	1,404.1
Virginia	19.1	326.8	607.8
California	13.9	252.3	577.2
New York	5.7	105.1	184.5
Arkansas	4.8	73.9	159.4
Pennsylvania	3.8	87.3	145.3
Texas	4.2	64.6	116.2
Mississippi	4.0	65.6	110.4
Georgia	3.1	44.6	100.6
Massachusetts	2.8	44.1	95.8
Wisconsin	2.7	48.6	92.0
Upholstered household furniture (SIC 2512)	89.4	1,679.3	3,429.8
North Carolina	28.1	537.1	1,134.7
California	10.6	228.0	441.1
Mississippi	7.9	145.8	332.6
Tennessee	7.5	111.1	237.2
Texas	3.5	61.8	119.3
Virginia	2.5	45.3	90.9
Pennsylvania	2.2	47.0	90.5
Illinois	2.5	46.6	88.7
New York	2.2	46.1	80.6
Indiana	2.3	37.2	79.4
Arkansas	2.3	37.3	78.5
Metal household furniture (SIC 2514)	34.1	695.0	1,450.2
California	6.3	152.8	280.2
Illinois	4.2	101.5	214.2
Tennessee	2.1	47.0	94.6
Pennsylvania	2.1	36.1	92.4
North Carolina	2.3	38.9	87.4
New York	2.0	40.8	80.1

Source: Based on Annual Survey of Manufactures, 1978 (M78-AS-6).

GENERAL INDUSTRY STATISTICS

Operating Ratios

The latest report issued in the annual line of business survey series conducted by the Federal Trade Commission covered the year 1976. Manufacturers of household furniture ranked 194 out of 234 manufacturing industries in operating income as a percent to assets. Total selling expense, which includes not only media expenditures but also expenditures for sales salaries and expenses, as a percent to sales was 9.1% in 1976, well above the 6.6% U.S. average.

Selected Operating Ratios of U.S. Manufacturers
& Household Furniture Manufacturers, 1976

	U.S. Manufacturers Weighted Average	Household Furniture Manufacturers	Rank Among All U.S. Industries (Out of 234)
Operating income, % to assets	10.3%	8.0%	194
Operating income, % to sales	7.7	5.2	189
Total selling expense, % to sales	6.6	9.1	92
Media advertising expense, % to sales	1.2	1.5	70
Research & development expense, % to sales	1.9	0.3	124

Source: Federal Trade Commission,
Annual Line of Business Report 1976
(Issued May 1982)

PRODUCTION

The level of industrial production in the household furniture industry, as measured by the Federal Reserve Board, spurted ahead 16.9% in the January through October 1983 period compared with the annual index for 1982. This index is a measure of the physical output of all factories in the industry, expressed as a percentage of production in a base year, currently 1967.

Industrial Production Index for the Household Furniture Industry
1978-1982 & January to October 1983
(1967 = 100)

	Jan.-Oct. 1983	1982	1981	1980	1979	1978	% Change 10 months 1983/ Full year 1982
Household furniture (SIC 251)	167.0	142.8	151.7	144.4	161.9	149.3	+ 16.9%

Source: Federal Reserve Board of Governors,
Industrial Production, G12.3.

SHIPMENTS

Measured in constant 1972 dollars, which eliminates the effect of inflation, the value of household furniture shipments in 1984 is expected to rise 9.5% compared with 1983. During the 1972-1983 period, the compound annual growth rate for household furniture was a -1.9%.

Percent Change in the Value of Constant (1972) Dollar Shipments of Household Furniture by All U.S. Producers, 1982 - Forecasted 1984

	Constant (1972) Dollars		Compound Annual
	% Change Forecasted 1984/1983	% Change 1983/1982	Growth Rate 1972-1983
Household furniture, total	+ 9.5%	+ 11.7%	- 1.9%
Wood household furniture	+ 10.0	+ 11.0	- 0.7
Upholstered household furniture	+ 11.0	+ 15.0	+ 0.5
Metal household furniture	+ 9.3	+ 11.0	- 1.3
Mattresses & bedsprings	+ 9.8	+ 9.9	+ 1.4
Wood TV & radio cabinets	+ 8.4	+ 4.9	- 6.5
Household furniture, n.e.c.	+ 7.8	+ 6.5	+ 1.1

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of Industrial Economics
1984 U.S. Industrial Outlook

SHIPMENTS

Furniture

In their October 1983 newsletter, the National Association of Furniture Manufacturers forecast the value of furniture shipments to 1985. According to the Association, industry shipments were valued at $11.6 billion, a 19.1% increase over 1982. By 1985, the value of furniture shipments is expected to rise to $14.2 billion.

Dollar shipments of wood furniture increased 16.8% in 1983 and are expected to gain 22.1% in 1984, while the value of upholstered furniture shipments rose 19.6% in 1983 and will rise 8.7% in 1984. The reason upholstery shipments peak prior to wood shipments is because new upholstery is often used to upgrade the appearance of an existing house, but new construction or resales of existing houses is typically important for casegoods growth. Residential construction is projected by the NAFM to grow 39.7% in 1983 and an additional 13.8% in 1984.

The NAFM anticipates that unit shipments of furniture will grow 15.7% in 1983 versus 1982 and 10.0% in 1984 compared with 1983. These gains will bring the quantity shipped to within 2% of the peak year 1978, when unit shipments were their highest in history. In 1985, the quantity of furniture shipments is expected to rise only 0.3% as the economy slows down, according to the association.

Value of Furniture Shipments, 1982 & Forecasts for 1983-1985
(In Billions of $)

	1985(f)	1984(f)	1983(f)	1982
Total industry shipments	$14.233	$13.504	$11.575	$ 9.722
% change from previous year	+ 5.4%	+16.7%	+19.1%	- 8.6%
Adjusted for inflation	+ 0.3	+10.0	+15.7	- 13.1
Wood furniture shipments	$ 6.976	$ 6.680	$ 5.473	$ 4.687
% change from previous year	+ 4.4	+22.1	+16.8	- 9.7
Adjusted for inflation	- 1.0	+15.5	+12.4	- 14.1
Upholstered furniture shipments	$ 4.430	$ 4.172	$ 3.839	$ 3.211
% change from previous year	+ 6.2	+ 8.7	+19.6	- 9.7
Adjusted for inflation	+ 1.5	+ 3.8	+18.1	- 14.1
Metal furniture shipments	$ 2.827	$ 2.652	$2.263	$1.825
% change from previous year	+ 6.6	+17.2	+24.0	- 3.8
Adjusted for inflation	+ 1.1	+ 9.7	+18.5	- 9.2

(f) = forecasted

Source: National Association of Furniture Manufacturers,
The Furniture Executive, October 1983

Over the first 10 months of 1983, the value of shipments in the furniture industry was 18% higher than a year ago while the value of new orders was 24% higher than in the January to October 1982 period, according to the National Association of Furniture Manufacturers. The shipment value of recliners increased 32% compared with the same 1982 period, with an identical percentage rise in the value of new orders.

SHIPMENTS

Furniture

The October 1983 value of shipments in the furniture industry increased 22% over the October 1982 shipment value. New orders were up 18% and unfilled orders were up 31% in October 1983 from October 1982.

Percent Changes in the Value of Furniture Shipments & New & Unfilled Orders, January-October 1983 vs. 1982, October 1983 vs. 1982

	January-October 1983/ January-October 1982		October 1983/October 1982		
	Value of Shipments	New Orders	Value of Shipments	New Orders	Unfilled Orders
Industry, total	+18%	+24%	+22%	+18%	+31%
Case goods	+14	+25	+24	+30	+46
Upholstered furniture	+22	+25	+24	+ 9	+17
Occasional tables	+17	+14	+37	+ 5	+69
Recliners	+32	+32	+24	+ 5	nr
Summer & casual furniture	+12	+13	+ 7	+11	+11

nr = not reported.

Source: National Association of Furniture Manufacturers, *Monthly Statistical Report*, November 1983

Using 1972 as the base year (equal to 100) the National Association of Furniture Manufacturers measures the changes in new orders and the value of shipments of selected furniture groups. The resulting index on the value of shipments of tables rose 54.5% in October 1983 compared with the year 1982. The value of new orders in October 1983 increased more than 50% over 1982 (relative to the 1972 base) for both case goods (50.4%) and recliners (58.9%). New orders for tables fell 4.5% in October 1983 versus 1981, the only category that was lower in October 1983 than it was in 1981.

Trends in Furniture Shipments & New Orders, 1981, 1982 & October 1983
(Indexes, 1972=100)

	Value of Shipments			New Orders		
	October 1983	1982	1981	October 1983	1982	1981
Industry, total	194	158	176	197	144	160
Case goods	213	161	178	191	127	147
Upholstered furniture	184	151	171	186	155	167
Tables	377	244	258	170	148	178
Recliners	299	209	218	356	224	219

Source: National Association of Furniture Manufacturers, *Monthly Statistical Report* November 1983

SHIPMENTS

Bedding

Through the first 10 months of 1983, shipments of mattresses and foundations were valued 18.9% higher than the same year-ago period, while unit shipments registered a 16.0% gain.

Percent Change in the Quantity & Value of Bedding Shipments
January - October 1982, 1983

	10 months 1983 vs. 10 months 1982		
	Quantity	Value	Unit Price
Mattresses			
Innerspring, other than crib	+ 16.3%	+ 19.6%	+ 2.9%
Foam core, other than crib	+ 8.1	+ 9.1	+ 0.9
Other, excluding crib	+ 71.4	+209.7	+ 80.6
Total	+ 15.8	+ 19.0	+ 2.8
Foundations			
Spring	+ 17.1	+ 19.4	+ 1.9
Foam	- 7.0	- 1.9	+ 5.5
Other	- 0.6	+ 17.0	+ 17.7
Mattresses & foundations, total	+ 16.0	+ 18.9	+ 2.5

Source: National Association of Bedding Manufacturers, NABM Sales Trends Report, December 1983.

The U.S. bedding industry shipped 23.2 million pieces, worth $1.7 billion, in 1982 according to a survey by the National Association of Bedding Manufacturers. This is the first such industry survey since the Census Bureau ceased publication of their quarterly report at the end of 1980.

The value of conventional adult mattresses shipped by all U.S. producers, not only those classified in the industry, was $780 million in 1982. In units, 11.5 million were shipped in that year, 85% of which were innerspring mattresses. Foundations shipments were valued at $543 million with 8.8 million shipped; 77% had spring constructions.

Of the 1.1 million dual-purpose furniture pieces shipped in 1982, over 82% had a foam core.

SHIPMENTS

Bedding

Quantity & Value of Bedding Shipments, 1982

	Quantity (Mil. Units)	Value of Shipments (Mil. $)
Adult mattresses, conventional	11.5	$ 780
Foundations, all types	8.8	543
Crib mattresses	1.0	19
Dual-purpose furniture	1.1	328
Dual-purpose inserts (sold to others)	0.6	15
Sleep system ensembles (hybrids, electric beds, airbeds, incl. foundations)	0.2	64
Total	23.2	1,749

Source: National Association of Bedding Manufacturers.

Value of Shipments of Household Furniture & Bedding
By All U.S. Producers, 1980, 1981

	Value of Shipments (Mil. $)		% Change
	1981	1980	1981/1980
Wood household furniture, total	$ 5,220.3	$ 4,889.0	+ 6.8%
Living room, family room & den furniture	1,367.8	1,257.0	+ 8.8
Dining room, kitchen furniture, except cabinets	1,151.7	1,094.0	+ 5.3
Bedroom furniture	1,715.8	1,668.8	+ 2.8
Infants' & children's furniture	277.6	243.7	+ 13.9
Outdoor & unpainted, unassembled furniture	196.1	155.0	+ 26.5
Wood household furniture, n.s.k.	511.3	470.5	+ 8.7
Upholstered wood household furniture	3,562.5	3,330.6	+ 7.0
Metal household furniture, total	1,498.0	1,434.1	+ 4.5
Dining & dinette furniture	376.0	347.6	+ 8.2
Kitchen furniture	102.3	102.1	+ 0.2
Porch, lawn, outdoor & casual furniture	364.0	348.8	+ 4.4
Other metal household furniture	545.4	519.8	+ 4.9
Metal household furniture, n.s.k.	110.4	115.8	- 4.7

(continued)

Value of Shipments of Household Furniture & Bedding By All U.S. Producers, 1980, 1981

(continued)

	Value of Shipments (Mil. $)		% Change
	1981	1980	1981/1980
Mattresses & bedsprings, total	$ 2,220.3	$ 2,043.9	+ 8.6%
Innerspring mattresses, other than crib size	739.6	669.8	+ 10.4
Other mattresses, including crib mattresses	141.4	130.6	+ 8.3
Bedsprings, excluding innerspring units	561.7	508.5	+ 10.5
Convertible sofas	483.0	461.6	+ 4.6
All other dual-purpose sleep furniture	95.6	92.6	+ 3.2
Mattresses & bedsprings, n.s.k.	199.0	180.7	+ 10.1
Wood TV, radio, stereo & sewing machine cabinets	296.9	309.7	- 4.1

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1981,
Value of Product Shipments M81(AS)-2.

Detailed information on furniture shipments is available only in the complete census of manufactures reports. Information from the 1982 census had yet to be released in early 1984, so the following information from the previous census, covering the year 1977, is the latest available on the quantity and value of shipments in detail. Information on bedding shipments follows on page 21.

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1972, 1977

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Wood household furniture, total	na	na	--	$3,890.7	$2,716.8	+ 43.2%
Wood living room, library, family room & den furniture, except sewing machine cabinets	na	na	--	859.8	614.4	+ 39.9
Cabinets, including record, music etc., excl. sewing machine, radio, phono & TV cabinets	na	na	--	61.6	28.8	+113.9
Chairs, except dining room chairs	2,019.8	na	--	48.1	38.2	+ 25.9
Rockers	494.7*	293	+ 68.8%	23.4	6.9	+239.1
Tables, except card & phone tables	9,844.0	13,452	- 26.8	441.4	388.3	+ 13.7
Desks	535.8	502	+ 6.7	58.0	40.3	+ 43.9
Credenzas, bookcases & bookshelves	na	na	--	77.4	42.5	+ 82.1

SHIPMENTS

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1972, 1977

(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Other nonupholstered living room furniture	na	na	--	$ 90.7	$ 56.5	+ 60.5%
Wood living room, library, family room, & den furniture, except sewing machine cabinets, n.s.k.	na	na	--	59.2	12.9	+358.9
Wood dining room & kitchen furniture, except cabinets	na	na	--	962.3	603.6	+ 59.4
Tables, 30 x 40 inches or more, dining room	1,673.8*	1,894	- 11.6%	224.4	136.4	+ 64.5
Chairs, dining room	10,526.9*	11,392	- 7.6	375.6	251.2	+ 49.5
Buffets & servers, dining room	795.9	648	+ 22.8	132.5	74.1	+ 78.8
China & corner cabinets, dining room	588.7*	634	- 7.1	128.0	83.9	+ 52.6
Other dining & kitchen furniture	na	na	--	45.2	44.1	+ 2.5
Wood dining room & kitchen furniture, excl. cabinets, n.s.k.	na	na	--	56.6	13.9	+307.2
Wood bedroom furniture	na	na	--	1,290.3	1,029.2	+ 25.4
Beds, excl. headboards & headboard beds, bunk beds, cribs, cradles, Hollywood beds & youth beds	1,626.4*	1,638	- 0.7	110.3	62.2	+ 77.3
Headboards & headboard beds, incl. padded	3,553.9*	4,018	- 11.5	168.8	137.0	+ 23.2
Bunk beds, excl. mattresses & detachable springs	446.1*	936	- 52.3	30.4	33.6	- 9.5
Dressers, vanities & dressing tables	3,075.8*	4,147	- 25.8	343.9	328.1	+ 4.8
Wardrobes, chifforobes, armoires & wardrobe-type cabinets	204.7*	352	- 41.8	44.4	49.7	- 10.7
Chest of drawers	2,722.3*	3,788	- 28.1	226.2	226.5	- 0.1
Cedar chests	256.5	na	--	26.4	na	--
Night tables & stands	2,899.0*	3,763	- 23.0	135.5	118.2	+ 12.9
Other nonupholstered bedroom furniture	na	na	--	123.6	40.8	+202.9
Wood bedroom furniture, n.s.k.	na	na	--	82.8	na	--
Infants' & children's wood furniture	na	na	--	118.8	82.5	+ 44.0
Cribs, incl. springs sold as part of crib	na	1,174	--	47.7	28.8	+ 65.6
Play yards & play pens	107.3*	847	- 87.3	1.8	5.8	- 69.0
Other infants' & children's furniture	na	na	--	57.5	45.6	+ 26.1
Infants' & children's wood furniture, n.s.k.	na	na	--	11.8	2.3	+413.0

(continued)

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1972, 1977

(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Wood outdoor furniture, unpainted wood furniture & unassembled & knock-down wood furniture	na	na	--	$ 185.8	$ 107.9	+ 72.2%
Porch, lawn, beach & similar wood furniture: chairs, rockers, benches & chaise lounges, incl. steamer & deck chairs	2,468.7*	2,142	+ 15.2%	53.2	34.2	+ 55.5
Other wood porch, lawn, beach & similar furniture	na	na	--	24.3	26.1	- 6.9
Unpainted wood furniture (furniture-in-the-white):						
Chest of drawers	na	670	--	7.5	11.5	- 34.8
Other furniture-in-the-white, unpainted	na	na	--	42.9	16.3	+163.2
Unassembled or knock-down furniture, unpainted or finished, sold in kits	na	na	--	46.7	16.2	+188.3
Wood outdoor furniture, unpainted wood furniture & unassembled & knock-down wood furniture, n.s.k.	na	na	--	11.2	3.6	+211.1
Wood household furniture, n.s.k.	na	na	--	473.7	279.2	+ 69.7
Upholstered wood household furniture, total	na	na	--	2,735.7	1,990.5	+ 37.4
Sofa, davenports (excl. dual-purpose), settees & love seats excl. chairs sold as part of suites & sectional sofa pieces	6,729.1	6,752	- 0.3%	1,194.2	884.0	+ 35.1
Chairs, except reclining	5,077.8	7,721	- 34.2	469.4	478.6	- 1.9
Sectional sofa pieces, incl. pieces seating one person	801.4*	464*	+ 72.7	106.0	62.6	+ 69.3
Rockers, incl. swivel rockers	1,438.0*	1,811	- 20.6	120.6	102.8	+ 17.3
Reclining chairs, all types	3,504.8	3,288*	+ 6.6	352.9	248.5	+ 42.0
Other upholstered wood household furniture	na	na	--	99.4	62.6	+ 58.8
Upholstered household furniture, n.s.k.	na	na	--	393.2	191.4	+105.4
Metal household furniture, total	na	na	--	1,231.2	859.3	+ 43.3
Metal household dining, dinette & breakfast furniture	na	na	--	319.1	245.6	+ 29.9
Tubular metal, incl. chairs whether padded or plain:						
Sets (tables & chairs)	2,260.9	2,606	- 13.2	246.1	202.8	+ 21.3
Tables (not sold with a set)	675.3*	na	--	16.9	17.1	- 1.2
Chairs (not sold with a set)	923.7*	1,518	- 39.1	13.4	19.0	- 29.5

(continued)

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1972, 1977

(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Other metal dinette, dining & breakfast furniture	na	na	--	35.7	5.5	+549.1%
Metal household dining, dinette & breakfast furniture, n.s.k.	na	na	--	7.0	1.2	+483.3
Metal kitchen furniture	na	na	--	73.4	71.4	+ 2.8
Kitchen furniture, excl. breakfast furniture reported as "dining, dinette & breakfast furniture":						
Cabinets (base, top, base wall, utility, etc.)	na	na	--	49.6	40.4	+ 22.8
Stools, padded & plain	1,142.5	2,377	- 51.9%	17.2	25.3	- 32.0
Tables, incl. hostess carts	307.1	339*	- 9.4	5.5	4.0	+ 37.5
Metal kitchen furniture, n.s.k.	na	na	--	1.1	1.7	- 35.3
Metal porch, lawn, outdoor & casual furniture	na	na	--	275.9	177.1	+ 55.8
Tubular aluminum:						
Chairs, rockers, benches, chaise lounges & settees	11,304*	21,941	- 48.5	122.5	101.0	+ 21.3
Other tubular aluminum porch, lawn & outdoor furniture	na	na	--	29.2	9.7	+201.0
Cast & wrought iron:						
Chairs, rockers, benches, chaise lounges & settees	1,221.2	1,354	- 9.8	44.7	22.7	+ 96.9
Other cast & wrought iron porch, lawn & outdoor furniture	na	na	--	15.5	10.5	+ 47.6
Other metal porch, lawn, outdoor & casual furniture	na	na	--	37.4	19.5	+ 91.8
Metal porch, lawn, outdoor & casual furniture, n.s.k.	na	na	--	26.6	13.7	+ 94.2
Other metal household furniture	na	na	--	445.5	311.4	+ 43.1
Folding cots, rollable cots, army cots, & other metal beds	687.7*	1,176	- 41.5	15.6	18.3	- 14.7
Metal bed frames (with or without a headboard)	6,797.4*	9,615	- 29.3	77.8	52.8	+ 47.3
Upholstered metal household furniture	na	na	--	12.4	3.6	+244.4
Card tables & chairs	na	na	--	na	23.9	--
Medicine cabinets, incl. wall type & insert type	3,804.4*	3,586	+ 6.1	72.1	57.4	+ 25.6
Metal radio, phonograph, TV & hi-fi cabinets	295.4*	na	--	5.1	na	--

(continued)

SHIPMENTS

Quantity & Value of Shipments of Household Furniture, by All Producers
Detailed by Type, 1972, 1977
(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Infants' high chairs	985.2*	1,244	- 20.8%	$ 12.2	$ 11.4	+ 7.0%
Infants' car seats	1,051.3*	1,464	- 28.2	19.7	12.8	+ 53.9
Other infants' & children's metal furniture	3,066.5*	2,492	+ 23.1	47.6	24.5	+ 94.3
Other metal household furniture	na	na	--	108.9	65.6	+ 66.0
Other metal household furniture, n.s.k.	na	na	--	32.5	10.0	+225.0
Metal household furniture, n.s.k.	na	na	--	117.3	53.8	+118.0
Wood TV & radio cabinets, total	na	na	--	312.8	293.0	+ 6.8
Console phono cabinets & audio cabinets, incl. radio, phono & hi-fi cabinets	1,450.5	3,015	- 51.9	82.3	108.2	- 23.9
TV cabinets & combinations, TV, hi-fi, & radio	4,512.9	4,008	+ 12.6	171.6	147.4	+ 16.4
Sewing machine cabinets	651.5*	1,108	- 41.2	41.7	32.2	+ 29.5
Wood TV, radio & sewing machine cabinets, n.s.k.	na	na	--	17.7	5.2	+240.4
Household furniture, n.e.c., total	na	na	--	281.8	190.3	+ 48.1
Plastics & fibrous glass cabinets incl. radio, TV, phono, hi-fi & combinations	na	14,323.4	--	85.1	59.7	+ 42.5
Reed & rattan furniture, incl. willow, wicker & cane	na	na	--	42.4	21.5	+ 97.2
Other plastics & fibrous glass household furniture, excl. cabinets	na	na	--	87.3	80.8	+ 8.0
Other household furniture, except wood, metal, plastics or fibrous glass, incl. corrugated furniture	na	na	--	35.5	9.2	+285.9
Household furniture, n.e.c., n.s.k.	na	na	--	31.5	19.1	+ 64.9

na = not available
n.e.c. = not elsewhere classified.
n.s.k. = not specified by kind.
* = Indicates a portion of this total has been estimated by the Census Bureau.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series MC77-I-25A.

SHIPMENTS

Quantity & Value of Shipments of Bedding, by All Producers, Detailed by Type, 1972, 1977

	Quantity (Thousands of Units)			Value (Millions of $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Mattresses & bedsprings, total	na	na	--	$1,481.5	$1,079.6	+ 37.2%
Innerspring mattresses, except crib size	9,638.1*	10,520	- 8.4%	492.6	336.6	+ 46.3
Other mattresses, incl. crib size	na	na	--	108.3	78.4	+ 38.1
Crib mattresses, all types	1,356.2*	1,735	- 21.8	17.9	16.4	+ 9.1
Latex foam core mattresses, other than crib size	184.5*	486	- 62.0	5.8	24.2	- 76.0
Urethane foam core mattresses, other than crib size	1,542.2	1,475	+ 4.6	59.7	24.0	+148.7
Other mattresses, other than crib size	na	675	--	6.9	11.7	- 41.0
Other mattresses, n.s.k.	na	na	--	18.0	2.1	+757.1
Bedsprings, total	na	na	--	360.6	277.8	+ 29.8
Box springs, with or without legs	6,566.0	9,022	- 27.2	282.1	263.2	+ 7.2
Other bedsprings	1,767.9*	754	+134.5	54.7	9.7	+463.9
Bedsprings, n.s.k.	na	na	--	23.8	4.9	+385.7
Convertible sofas, total	na	na	--	302.6	208.6	+ 45.1
Convertible sofas:						
From purchased mattresses, incl. interplant transfers	991.2	773	+ 28.2	211.8	122.0	+ 73.6
From mattresses produced at the same establishment	392.7	461	- 14.8	76.8	85.8	- 10.5
Convertible sofas, n.s.k.	na	na	--	14.0	0.8	+1,650.0
All other dual-purpose sleep furniture	na	na	--	31.8	56.4	- 43.6
Jacknife sofa beds & chair beds	270.2*	723	- 62.6	20.7	33.8	- 38.8
Studio couches	na	348	--	10.8	22.6	- 52.2
All other dual-purpose furniture, n.s.k.	na	na	--	0.3	--	--
Mattresses & bedsprings, n.s.k.	na	na	--	185.6	121.8	+ 52.4

na = not available.
n.s.k. = not specified by kind.
* = Indicates a portion of this total has been estimated by the Census Bureau.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series, MC77-I-25A.

PRODUCER PRICES

The producer (factory) price index for all household furniture categories rose at a 4.8% rate in the first three-quarters of 1983 compared with the 1982 annual index. This increase was more than twice as large as the change in the rate for all commodities. During this period, wood household furniture increased at the factory price level by 5.0%, dining room furniture rose 5.7%, bedroom furniture was up 4.9% and upholstered household furniture increased 4.4%. Producer prices for bedding products were 9.1% higher than in 1982.

Producer Price Indexes for Specified Furniture & Bedding, 1981, 1982 & January-to-September 1983

(1967 = 100 unless otherwise noted.)

	January-September 1983	% Change 9 months 1983/ full year 1982	Annual Averages		
			1982	1981	% Change 1982/1981
All commodities	302.2	+ 1.0%	299.3	293.0	+ 2.1%
Household furniture	233.6	+ 1.6	229.8	219.2	+ 4.8
Wood household furniture	258.8	+ 2.5	252.6	240.6	+ 5.0
Living room furniture	242.8	+ 3.4	234.7	224.6	+ 4.5
Table	240.0	+ 2.6	234.0	224.3	+ 4.3
Desks (6/80=100)	115.6	+ 4.0	111.2	106.6	+ 4.3
Chairs (6/80=100)	123.6	--	na	na	--
Credenzas & bookcases (6/80=100)	121.6	+ 4.7	116.1	108.0	+ 7.5
Other nonupholsted living room furniture (6/80=100)	115.5	+ 2.2	113.0	107.9	+ 4.7
Dining room	278.8	+ 1.9	273.7	258.9	+ 5.7
Table	278.7	+ 2.1	272.9	255.8	+ 6.7
Chairs	294.7	+ 1.8	289.4	273.3	+ 5.9
Buffets & servers	259.9	+ 3.6	250.8	240.6	+ 4.2
China & corner cabinets	275.4	--	na	251.4	--
Other dining room & kitchen furniture (6/80=100)	115.8	+ 6.1	109.1	106.7	+ 2.2
Bedroom	254.3	+ 1.9	249.6	238.0	+ 4.9
Beds, except bunk	256.2	+ 1.8	251.7	235.3	+ 7.0
Headboard sets (6/80=100)	116.0	+ 2.3	113.4	108.2	+ 4.8
Dressers, vanities & dressing tables	252.5	+ 1.0	250.1	237.6	+ 5.3
Night tables & stands (6/80=100)	119.5	+ 3.5	115.4	108.8	+ 6.1
Chests	247.9	+ 1.8	243.6	233.5	+ 4.3
Wardrobes (6/80=100)	114.8	+ 1.7	112.9	107.0	+ 5.5
Other nonupholstered bedroom furniture (6/80=100)	117.3	+ 2.5	114.4	109.7	+ 4.3
Other wood household furniture (6/80=100)	110.4	+ 2.6	107.6	103.7	+ 3.8
Unpainted wood furniture (6/80=100)	116.5	+ 6.0	109.9	104.4	+ 5.3
Upholstered household furniture	212.4	+ 1.5	209.3	200.4	+ 4.4
Sofa	212.1	+ 1.0	209.9*	na	--
Chair	212.5	+ 1.6	209.1	na	--
Sofa bed, convertible	204.0	--	na	199.7	--
Other upholstered furniture (6/82=100)	103.3	--	na	na	--

(continued)

PRODUCER PRICES

Producer Price Indexes for Specified Furniture & Bedding
1981, 1982 & January-to-September 1983
(1967 = 100 unless otherwise noted.)
(continued)

	January-September 1983	% Change 9 months 1983/ full year 1982	Annual Averages		
			1982	1981	% Change 1982/1981
Metal household furniture	209.1	--	209.1	206.8	+ 1.1%
Porch & lawn furniture	299.3	+ 1.9%	293.7	280.7	+ 4.6
Bedding	180.8	- 10.5	202.1	185.2	+ 9.1
Mattress, innerspring	204.0	+ 0.7	202.6	184.9	+ 9.6

* May to December average.

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

U.S. imports of furniture (including office furniture) and bedding jumped 30% in 1983 to an estimated $1.4 billion compared with $1.1 billion in 1982, according to the Bureau of Industrial Economics. Imports from Canada, Denmark, Taiwan and Yugoslavia accounted for about two-thirds of this total. An increasing amount of knock-down furniture and parts from Taiwan and Yugoslavia for assembly into finished products in U.S. plants was mainly responsible for the gain in import value, according to the BIE. Imports of wooden furniture, other than chairs and parts, increased 35% over 1982 to $553 million.

Exports of household furniture and bedding declined 11% in value to about $225 million in 1983, an estimated 2% of domestic production. This drop reflected the low levels of consumer spending in Canada and decreasing trade with Saudi Arabia, the major U.S. furniture export markets. Furniture and bedding exports to these two countries represent about half of the U.S. total.

Value of Imports & Exports of Furniture & Bedding, 1980-1983
(Million $)

	1983(e)	1982(e)	1981	1980	% Change 1983/1982	Compound Annual Growth Rate 1972-1983
Furniture & bedding						
Imports	$1,440	$1,110	$989	$846	+ 29.7%	+ 19.4%
Exports	225	253	280	218	- 11.1	+ 19.4

Source: U.S. Bureau of Industrial Economics
1984 U.S. Industrial Outlook

THE POTENTIAL MARKET

According to the U.S. Current Population Survey (CPS), there were 83.9 million households in the U.S. as of March 1983, 391,000 more than in 1982. This marked the first time in 20 years that there was no statistically significant increase in the number of households in a year-to-year comparison. The average net annual increase for the 3-year period since 1980 was about 1 million households a year.

Since the completion of the March 1983 CPS, the number of new household formations has risen substantially. In the April to July 1983 period, an estimated 300,000 households were formed. Chase Econometrics projected that the number of new households will approach a record 2 million in the 12 months ended March 1984.

Number of U.S. Households by Type, 1980-1983
(In thousands as of March of each year)

	1983	1982	1981	1980	% Change 1983/1981
Households, total	83,918	83,527	82,368	80,776	+ 1.9%
Family households, total	61,393	61,019	60,309	59,550	+ 1.8
Nonfamily households, total	22,525	22,508	22,059	21,226	+ 2.1
Living alone	19,250	19,354	18,936	18,296	+ 1.7
Average household size (number)	2.73	2.72	2.73	2.76	

Source: U.S. Bureau of the Census,
Households, Families, Marital Status and Living Arrangements: March 1983
P-20 No. 382.

As part of the general economic recovery in the U.S. in 1983, housing starts climbed 60.3% over the depressed 1982 level to 1.7 million units. The number of housing permits authorized, a harbinger of future housing activity, grew almost 60% in 1983. Even so, some analysts feel that the official figures understate the development of new housing because they do not consider "adaptive use" housing, where a building formerly used for another use (for example, a school or factory) is converted into apartments or condominiums. This new housing innovation contributed perhaps 500,000 units to the housing stock in 1983.

Total single-family housing starts in 1983 were 1.1 million units, up 61% over 1982. Starts of homes with five or more units rose 63% to 521,000. In 1984, housing starts are expected to repeat their 1983 performance, with somewhere between 1.6 million and 1.7 million units started.

Of course, the higher level of completed housing construction creates a demand for furniture and bedding products. According to industry surveys, people who move account for approximately a quarter of furniture and bedding sales.

THE POTENTIAL MARKET

U.S. Privately-Owned Housing Activity, 1981-1983
(Thousands of Units)

	1983(p)	1982	1981	% Change 1983/1982
Housing starts	1,703.1	1,062.2	1,084.2	+ 60.3%
Housing permits authorized	1,596.8	1,000.5	985.5	+ 59.6
New housing sales	625.0	412.0	436.0	+ 51.7
Housing resales	2,704*	1,990.0	2,419.0	+ 35.9

* Estimate

Source: U.S. Bureau of the Census,
Construction Reports Division;
National Association of Realtors

PERSONAL CONSUMPTION EXPENDITURES

Personal consumption expenditures for furniture and bedding in 1982 amounted to $19.1 billion, a 3.5% decrease from expenditures of $19.8 billion in 1981. These expenditures cover the value at retail of goods reaching the consumer through all channels, including direct sales by manufacturers or wholesalers, etc.

Total U.S. personal consumption expenditures over the same time period rose 7.2% to $1,992 billion from $1,857.2 billion in 1981. Thus, furniture and bedding's share of total expenditures dropped to 1.0% in 1982 compared with 1.1% the previous year.

U.S. Personal Consumption Expenditures & Share Accounted For By Furniture & Bedding, 1979-1982
(Billions of Dollars)

	1982(p)	1981	1980	1979	% Change 1982/1981	% Change 1982/1979
Personal consumption expenditures:						
U.S. total	$1,991.2	$1,857.2	$1,668.1	$1,507.2	+ 7.2%	+32.1%
Furniture & bedding	19.1	19.8	18.6	18.2	- 3.5	+ 4.9
% of U.S. total	0.9%	1.07%	1.11%	1.21%		

(p) = preliminary.

Source: U.S. Department of Commerce,
Office of Business Economics.

RETAIL SALES BY STORE TYPE

In 1982, furniture and department stores sold furniture worth an estimated $17.8 billion at retail, according to the National Association of Furniture Manufacturers. This figure does not include sales in catalog showrooms, variety stores or via mail order.

The following table breaks out furniture sales by manufacturers' invoice value, which totaled $9.1 billion in 1982, 4.8% lower than the previous year.

Estimated Sales of Selected Furniture Categories In Furniture & Department Stores
(Millions of Dollars in Manufacturers' Invoice Value)

	Total		Furniture Stores		Department Stores	
	1982	1981	1982	1981	1982	1981
Furniture categories:						
Upholstered furniture	$3,447.2	$3,593.4	$2,648.6	$2,839.7	$ 798.5	$ 753.7
Case goods, total	3,006.5	3,278.9	2,321.8	2,598.6	684.7	680.3
Dining room	1,299.2	1,401.2	1,000.5	1,107.5	298.7	293.7
Bedroom	1,707.3	1,877.7	1,321.3	1,491.1	386.0	386.6
Tables	1,300.2	1,324.7	999.8	1,045.7	300.5	279.0
Dual-purpose sleep furniture	663.7	556.9	519.2	445.6	144.5	111.3
Summer & casual furniture	192.2	**	144.4	**	47.8	**
Other household furniture	499.2	814.3	371.6	625.7	127.6	188.7
Total invoice value	9,109.1	9,568.3	7,005.5	7,555.3	2,103.6	2,013.0

* Includes invoice value of kitchen, dinette & juvenile furniture.
**Included in "Other household furniture" category.

Source: National Association of Furniture Manufacturers, Sales Planning Guide, 1983

The 1977 Census of Retail Trade, U.S. Bureau of the Census, contains the latest official information on retail sales of furniture and bedding. Sales information was obtained only from stores with payrolls, but not all store types were required to break out sales by merchandise category. The following table reflects sales of furniture and bedding in the major outlet types which did separately report on this category.

Reported sales of furniture and bedding totaled $14.7 billion in 1977. Furniture stores sales accounted for $10.8 billion, or 73.5% of the total. An additional $2.6 billion in sales came from department store sales in 1977.

Living room, dining room and bedroom furniture accounted for more than half of furniture and bedding sales in department stores, and more than three-quarters of sales in furniture stores.

RETAIL SALES BY STORE TYPE

Reported Sales of Furniture & Bedding by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Total reported	72,389	100.0%	$14,684.6	100.0%
Department stores**	6,736	9.3	2,598.4	17.7
Furniture stores	31,320	43.3	10,790.4	73.5
All other retail outlets	34,333	47.4	1,295.8	8.8

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

** Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in the mail order house data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Furniture Stores

Through the first 10 months of 1983, furniture store sales were slightly less (-0.2%) than 1982 sales through October. Furniture store sales fell 4.7% in 1982 compared to 1981 to $17.8 billion, virtually on a par with 1979 sales.

Between 1979 and 1981, the number of furniture stores (with payrolls) declined by 1,691 units to 28,342, according to County Business Patterns.

Furniture Stores: Number of Stores & Total Sales, 1979-1982

	1982	1981(r)	1980	1979	% Change 1982/1981	% Change 1982/1979
Sales (mil. $)	$17,813	$18,685	$18,028	$17,829	- 4.7%	- 0.1%
Number of stores*	na	28,342	29,070	30,033	--	--

na = not available (r) = revised
* Includes only establishments with payrolls.

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-82S;
County Business Patterns, 1979-1981

RETAIL SALES BY STORE TYPE

Furniture Stores

Seasonal Pattern in Furniture Store Sales: Percent of Year's Sales by Month, 1981, 1982

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1982	100.0%	7.4%	7.2%	8.2%	8.2%	8.3%	8.5%	8.5%	8.3%	8.0%	8.4%	9.0%	9.8%
1981	100.0	8.0	7.5	8.3	8.4	8.6	8.9	8.4	8.6	8.0	8.1	8.2	8.9

Source: Based on U.S. Bureau of the Census, Revised Monthly Retail Sales BR-13-82S.

According to Inside Furniture/HFD-Retailing Home Furnishing's annual compilation of the top 100 furniture stores, specialty stores did better than multi-product furniture stores, in general, in 1982. The largest sales gain of any store in the top 100 was registered by Scandinavian Design, up 41% from 1981. Levitz, by far the largest furniture chain in the U.S., dropped 0.5% to $485.6 million in sales in 1982.

The 25 Leading Furniture Retailers, 1981, 1982

	Sales (Mil. $)			Number of Stores	Sales Per Square Foot
	1982	1981	% Change 1982/1981	1982	1982
1. Levitz	$ 485.6	$ 488.0	- 0.5%	78	$ 112
2. Breuner's	135.0	135.0	--	16	na
3. W.S. Badcock	132.0*	120.0	+ 10.0	189	na
4. Haverty's	125.1	122.5	+ 2.1	65	na
5. Wickes	105.0	150.0	- 30.0	15	na
6. Reliable Stores	100.0	82.0*	+ 21.9	73	na
7. Rhodes	100.0	88.6	+ 12.9	50	81
8. Heilig Meyers	95.3	76.6	+ 24.4	82	64
9. RB Furniture	94.4	90.5	+ 4.3	77	78
10. Nebraska Furniture Mart	90.5	82.0	+ 10.4	1	402
11. Leath-Maxwell	90.0*	104.0*	- 13.5	na	na
12. Finger's	80.0	70.0	+ 14.3	6	na
13. McMahan's, Santa Monica, Ca.	65.0*	65.0	--	42	na
14. Seaman's	64.0*	57.0	+ 12.3	na	na
15. Barrows	61.0*	55.0	+ 10.9	na	na
16. Value City	60.0	55.0	+ 9.1	25	100
17. McMahan's, Carlsbad, Ca.	56.0*	56.0*	--	na	na
18. Huffman Koos	56.0*	60.0*	- 6.7	11	93*
19. J.M. Smyth/Homemakers	55.0	75.9*	- 27.5	11	116
20. Barker Brothers	50.0	52.0*	- 3.8	16	84
21. Alperts	50.0*	52.0*	- 3.8	10	143*
22. Scandanavian Design	44.5	31.5	+ 41.3	23	377
23. W & J Sloane	40.0*	60.0*	- 33.3	na	na
24. Sterchi Bros.	38.4	41.5	- 7.5	73	na
25. Hayne Furniture	36.0*	36.0*	--	na	na

* Estimated.

na = not available.

Source: Inside Furniture/HFD-Retailing Home Furnishings, May 1983.

RETAIL SALES BY STORE TYPE

Furniture/Home Furnishings Stores

Upholstered living room furniture accounted for 21.9% of sales in the typical home furnishings store in 1982, according to a survey conducted by the National Home Furnishings Association among its member stores. In total, living room furniture provided the typical store with 42.2% of its volume. Bedroom furniture accounted for 12.0%, dining room furniture for 9.5% and bedding, 7.1%.

The median home furnishings store in the 1982 survey had 21,000 square feet of space, of which 77% is used as the selling floor. About 50% of the selling space is devoted to living room furniture.

Operating Ratios of Furniture Departments
In Home Furnishings Stores & Furniture Stores, 1982
(Median Results)

	Home Furnishings Stores, Total		Furniture Stores	
	% of Selling Space	Sales Per Square Foot of Selling Space	% of Selling Space	Sales Per Square Foot of Selling Space
Living room furniture:				
Upholstered	27.4%	$ 54.05	29.9%	$ 56.25
Dual-purpose	6.9	48.85	7.5	66.67
Occasional	9.5	62.81	10.6	95.47
Recliners	6.4	63.62	7.5	67.87
Dining room furniture	11.8	57.98	12.4	71.25
Bedroom furniture	17.3	51.67	16.4	66.55
Bedding	5.9	76.48	6.2	88.91
Kitchen/dinette	4.7	31.10	4.0	61.97
Floorcoverings	3.6	93.77	2.0	80.23
Appliances	1.9	132.57	0.4	80.29
Other	4.9	147.49	3.1	190.32
Total	100.0	67.09	100.0	78.11

Source: National Home Furnishings Association,
"1982 Operating Experiences Report"
CompetitiveEdge, August 1983.

Department Stores

Sales in the furniture and bedding departments of the typical department store with sales over $1 million fell 0.9% in 1982, according to the annual Merchandising & Operating Results report released by the National Retail Merchants Association. In 1982, the median sales for all upstairs departments in the 103 stores surveyed increased 3.8%. While sales per square foot in the furniture and bedding departments were at a median $50.00, they reached a typical $109.00 for the upstairs store as a whole.

Department Stores

Selected 1982 Merchandising & Operating Results in Furniture & Bedding Departments in Department Stores with Sales Over $1 Million

(Median Results)

	Furniture & Bedding Total (70)*	Upholstered Furniture (50)*	Case Goods (43)*	Dual-Sleep Bedding & Other Sleep Furniture (58)*	All Other Furniture (28)*
Net sales, % change from last year	- 0.9%	+ 1.3%	- 5.7%	+ 3.4%	- 6.8%
Sales, % of merchandising division**	46.1	15.3	9.7	13.9	6.0
Sales, % of total store	4.5	1.6	0.9	1.4	0.6
Cumulative markon, %	47.8	48.1	48.6	46.9	50.2
Gross margin, % of net sales	40.8	41.0	37.7	43.5	41.2
Markdowns, % of net sales	13.3	13.0	15.2	9.2	17.2
$ sales per sq. ft. of selling space (main or largest selling unit)	$50.0	$40.0	$35.0	$91.0	$27.1
Number of stock turns (times)	1.9	2.3	1.2	3.8	1.2

* Number in parentheses represents the number of reporting companies in each category.

** Merchandise division for furniture & bedding is furniture & decorative accessories.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1982.

The 20 Leading Department Stores in Furniture Sales, 1981, 1982

(Estimated)

		Furniture Sales (Mil. $)			% to Total Store Sales
		1982	1981	% Change 1982/1981	1982
1.	Macy's New York	$ 62	$ 58	+ 6.9%	7%
2.	Bamberger's	60	56	+ 7.1	8
3.	Burdine's	38	38	--	7
4.	Macy's California	37	35	+ 5.7	6
5.	Bloomingdale's	36	40	- 10.0	6
6.	Foley's	34	32	+ 6.2	6
7.	Abraham & Straus	30	24	+ 25.0	5
8.	May Co. - California	28	27	+ 3.7	5
9.	Marshall Field	27	25	+ 8.0	4
10.	The Broadway	26	26	--	4
11.	The Bon	25	25	--	7

(continued)

The 20 Leading Department Stores in Furniture Sales, 1981, 1982
(Estimated)
(Continued)

		Furniture Sales (Mil. $)			% to Total Store Sales
		1982	1981	% Change 1982/1981	1982
12.	Dayton's	25	23	+ 8.7%	6%
13.	Hecht's	24	24	--	6
14.	Rich's	23	20	+ 15.0	6
15.	Emporium Capwell	22	24	- 8.3	4
16.	Maas Bros.	22	22	--	8
17.	Woodward & Lothrop	21.6	21	+ 2.9	6
18.	Jordan Marsh, Boston	21	20	+ 5.0	5
19.	Robinson's	21	18	+ 16.7	6
20.	Bullock's	21	22	- 4.5	4

Source: Inside Furniture/HFD-Retailing Home Furnishings, May 1983

Sleep Shops

With 1982 sales of about $24 million in 63 outlets, Ortho Mattress of Rancho Dominquez, Ca. was the largest operator of sleep shops in the U.S., according to a HFD-Retailing Home Furnishings survey.

The Top 25 Sleep Shops, 1982

	Sales (e) (Mil. $)	Number of Stores
1. Orthos Mattress, Rancho Dominquez, Ca.	$ 24	63
2. Hillside Bedding, Mt. Vernon, N.Y.	21	53
3. Mattress Discounters, Arlington, Va.	20	27
4. Mattress Warehouse, Akron, Oh.	20	37
5. Kleinsleep, Yonkers, N.Y.	19.7	14
6. Sleepy's, New Hyde Park, N.Y.	18.5	24
7. Sleep Country, Dallas, Tx.	16	8
8. City Mattress, Buffalo, N.Y.	15	11
9. American Bed Co., Houston, Tx.	14.5	17
10. Slumberland, St. Paul, Mn.	13.4	15
11. Stevens, Chicago, Il.	12	20
12. Royal Mattress, Atlanta, Ga.	11	8
13. Bed City, New York	10	28
14. W. Simmons, Cerritos, Ca.	7.5	14
15. Colony, Hackensack, N.J.	5.5	6
16. Sleep-O-Rama, Margate, Fla.	5.2	8
17. Off-Track Bedding, East Providence, R.I.	4.5	6

(continued)

RETAIL SALES BY STORE TYPE

Sleep Shops

The Top 25 Sleep Shops, 1982
(continued)

	Sales (e) (Mil. $)	Number of Stores
18. Siesta, Stoughton, Ma.	4.5	15
19. Sleep Quarters, Norfolk, Va.	3.5	5
20. Nationwide, Philadelphia, Pa.	3.5	6
21. Mattress Fair, Hatfield, Pa.	3.5	7
22. Sleep World, Woodbridge, N.J.	3	3
23. Mattress Discounters, Dallas, Tx.	3	3
24. Sleep Scene, Orlando, Fla.	2	3
25. Sleep World, Miami, Fla.	2	3

(e) = estimated.

Source: HFD-Retailing Home Furnishings,
June 20, 1983

CONSUMER PRICE INDEX

Consumer Price Indexes for Specified Furniture & Bedding Items
1981-1983

(1967 = 100 unless otherwise specified)

	Annual Averages			% Change	
	1983(p)	1982	1981	1983/1982	1983/1981
All items	298.4	289.1	272.4	+ 3.2%	+ 9.5%
Furniture & bedding	218.5	213.2	204.7	+ 2.5	+ 6.7
Bedroom furniture (1977 = 100)	151.6	143.6	135.0	+ 5.6	+ 12.3
Sofas (Dec. 1977 = 100)	118.2	117.8	117.0	+ 0.3	+ 1.0
Living room chairs & tables (Dec. 1977 = 100)	123.8	121.8	116.9	+ 1.6	+ 5.9
Other furniture (Dec. 1977 = 100)	141.4	140.0	134.5	+ 1.0	+ 5.1

(p) = preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

RETAIL ADVERTISING

Percent of Year's Total Newspaper Advertising Linage
Done By Retailers Each Month, 1982

Month	Bedroom Sets	Dinette Sets	Dining Room Sets	Living Room Sets	Living Room Chairs	Mattresses	Sofas & Sectionals	Studio Couches & Sofabeds
January	11.0%	9.2%	8.5%	10.5%	7.7%	10.3%	9.0%	9.9%
February	9.4	10.7	9.4	9.4	8.0	8.4	9.3	9.4
March	8.6	8.3	9.2	9.1	7.6	8.3	7.7	9.0
April	9.2	7.0	7.6	8.1	7.9	7.4	8.0	7.9
May	9.8	9.4	9.5	10.2	9.4	9.5	9.3	11.7
June	7.5	7.0	5.3	7.9	8.0	7.3	7.3	6.9
July	8.2	8.1	7.5	8.2	7.4	8.3	8.2	6.8
August	9.6	9.1	7.7	10.5	8.2	9.4	10.1	7.7
September	7.8	9.2	8.2	7.1	7.2	9.0	8.5	9.5
October	7.9	8.4	11.0	6.9	8.3	9.7	9.6	8.5
November	7.1	8.6	11.1	7.1	10.2	7.8	8.4	8.6
December	3.9	5.0	5.0	5.0	10.1	4.6	4.6	4.1

Source: The Advertising Checking Bureau, Inc.-
Neustadt Reports Division, covering retail
newspaper advertising linage in seven cities:
Chicago, Philadelphia, Cincinnati, Dallas,
Cleveland, Los Angeles & Washington, D.C.

FURNITURE STYLES/MATERIALS

One-third more bedroom and dining room suites were shown at the October 1982 Southern Furniture Market than at the same market a year ago, according to the Fine Hardwoods-American Walnut Association. Little change in composition or style was noted between the two shows. The Association did, however, detect an upgrading trend in low-end lines as manufacturers replaced more plastic and vinyl with hardwoods of the less-expensive species, such as beech, birch and elm.

Survey of Bedroom/Dining Room Suites & Modular Wall Units
At the Southern Furniture Market, October 1981, 1982

	October 1982		October 1981	
	Number of Suites	% of Total	Number of Suites	% of Total
BEDROOM/DINING ROOM SUITES	2,664	100.0%	1,981	100.0
By Woods & Materials				
Oak	676	25.4	435	22.0%
Pine	384	14.4	269	13.5
Cherry	285	10.7	150	7.6
Pecan	197	7.4	164	8.3
Maple	162	6.1	147	7.4
Mahogany	123	4.6	108	5.4

(continued)

FURNITURE STYLES/MATERIALS

Survey of Bedroom/Dining Room Suites & Modular Wall Units At the Southern Furniture Market, October 1981, 1982 (continued)

	October 1982		October 1981	
	Number of Suites	% of Total	Number of Suites	% of Total
By Woods & Materials (cont'd.)				
Ash	68	2.6%	58	2.9%
Walnut	65	2.4	43	2.2
European Ash Burl	41	1.5	22	1.1
Elm	31	1.2	19	1.0
Primavera	25	0.9	19	1.0
Beech	22	0.8	12	0.6
Birch	13	0.5	14	0.7
Other woods	77	3.0	66	3.3
Print	269	10.1	224	11.3
Paint	160	6.0	157	7.9
Plastic/vinyl	25	0.9	51	2.6
Brass/glass, etc.	41	1.5	23	1.2
By Styles				
Colonial & Early American	905	34.0	486	24.5
Contemporary*	836	31.4	649	32.8
English Traditional	379	14.2	242	12.2
French Provincial	165	6.2	190	9.6
Italian	107	4.0	55	2.8
American Traditional	67	2.5	190	9.7
Spanish	67	2.5	30	1.5
French Country	60	2.3	47	2.3
English Country	45	1.7	76	3.8
French Court	19	0.7	16	0.8
American Ranch	14	0.5	--	--

* Includes transitional, modern & modern Oriental styles

Source: Fine Hardwoods-American Walnut Association (Nov. 1983)

Due to changes in the survey procedure effective with the 1982 shows, the composition and styling of modular wall units shown at the October 1982 show can only be compared with the April 1982 show.

FURNITURE STYLES/MATERIALS

Survey of Modular Wall Units At the Southern Furniture Market
April, October 1982

	October 1982		April 1982	
	Number at Show	% of Total	Number at Show	% of Total
MODULAR WALL UNITS	542	100.0%	543	100.0%
By Woods & Materials				
Oak	148	27.3	121	22.3
Pine	54	10.0	58	10.7
Cherry	42	7.7	34	6.3
Pecan	37	6.8	31	5.7
Walnut	22	4.0	38	7.0
Mahogany	16	3.0	15	2.8
European Ash Burl	14	2.6	nr	nr
Maple	10	1.8	nr	nr
Ash	9	1.7	22	4.0
Primavera	9	1.7	12	2.2
Other woods	31	5.7	26	4.8
Print	72	13.3	28	5.2
Paint	38	7.0	21	3.9
Plastic/vinyl	26	4.8	89	16.4
Brass/glass, etc.	14	2.6	48	8.8
By Styles				
Contemporary	345	63.6	373	68.7
Colonial & Early American	70	12.9	35	6.4
English Traditional	57	10.5	49	9.0
Italian	16	3.0	32	5.9
French Provincial	15	2.8	18	3.3
American Traditional	14	2.6	12	2.2
English Country	9	1.7	9	1.7
French Country	7	1.3	5	0.9
Spanish	4	0.7	9	1.7
American Ranch	3	0.5	nr	nr
French Court	2	0.4	1	1.2

nr = not reported.

Source: Fine Hardwoods-American Walnut Association
(November 1983)

CONSUMER BUYING HABITS

Of the 416 consumers polled in the May 1983 Better Homes & Gardens annual survey, 55% intended to decorate or redecorate their living quarters in the year following the survey. More than three-quarters of the respondents shopped stores to get decorating ideas and 65% watched local newspapers for sales. Only 22% believed brand names were very important in determining the quality of furniture, although 51% thought they were somewhat important.

CONSUMER BUYING HABITS

Country (casual) furniture was preferred by 45.2% of the respondents, up from 27.3% in the 1982 survey. The popularity of modern/contemporary furniture also jumped in the year between surveys, with only 14.9% noting it as a preference in 1982.

Preferred Furniture Styles, 1983

	% of Respondents*
Country (casual)	45.2%
Traditional	35.8
Early American	29.8
Modern/Contemporary	23.6
Turn of the Century American	12.7
French Provincial	9.9
Formal English/French	9.1
Oriental	9.1
Mediterranean/Spanish	7.7
Italian Provincial	3.6
Eclectic (mixture)	28.8

* Total does not add to 100% due to multiple responses.

Price Panel Members Would Be Likely To Pay For a Dining Room Suite or a Master Bedroom Suite

	% of Respondents	
	Dining Room Suite	Master Bedroom Suite
Under $1,000	5.8%	14.7%
$1,000 - $1,999	27.2	44.3
$2,000 - $2,999	31.0	22.1
$3,000 - $3,999	22.4	13.5
$4,000 or more	11.7	4.0

Price Panel Members Would Be Likely To Pay For a Sofa

	% of Respondents
Under $500	11.5%
$500 - $749	37.0
$750 - $999	31.5
$1,000 - $1,999	15.9
$2,000 or more	2.4

The majority of panel members (60.1%) would like to see more smaller scale furniture available to fit smaller rooms.

CONSUMER BUYING HABITS

Type of Small Scale Furniture Panel Members Would Like To See

	% of Respondents*
Wall storage systems	57.6%
Dining furniture (buffets, chinas, etc.)	55.6
Upholstered chairs	51.6
Sofas	46.8
End tables/occasional tables	44.0
Dining room tables	30.0
Cocktail/coffee tables	33.6
Chest of drawers	30.4
Beds	12.0

* Total does not add to 100% due to multiple responses.

In an earlier BH & G/Inside Furniture survey, 436 members of the Consumer Panel told what pieces of living room and bedroom furniture they had purchased in 1981 and/or 1982. More than a quarter of the respondents bought a bed in 1982 and a fifth purchased a living room sofa. The following tables give in detail the percentage of panel members who bought furniture items for these rooms.

Percent of Panel Members Who Bought Specified Living Room Furniture In 1981 or 1982

	Bought In:	
	1982	1981
Sofa	20.4%	29.1%
Settee/loveseat	10.3	15.5
Convertible sofa	12.2	16.2
Upholstered chair	16.7	25.5
Non-upholstered chair	3.7	4.7
Commode/cabinet	3.2	5.8
End table/occasional table	20.0	29.1
Coffee/cocktail table	13.5	na
Bar/liquor cabinet	2.1	1.1
Game table	3.0	2.5
Wall storage system	7.6	10.1
Reclining chair (rocking type)	7.3	10.4
Reclining chair (non-rocking type)	9.9	12.6

na = not available

Percent of Panel Members Who Bought Specified Bedroom Furniture In 1981 or 1982

	Bought In:	
	1982	1981
Bed	26.1%	34.9%
Chest of drawers	18.6	19.8
Dresser	12.8	18.3
Cedar chest/chest	1.1	0.7
Armoire	2.1	3.2
Night table	9.9	14.0
Bookcase	9.4	6.1
Desk	9.6	8.3
Non-upholstered chair	6.2	6.8
Upholstered chair (not reclining)	5.3	5.8
Reclining chair (rocking type)	3.4	1.4
Reclining chair (non-rocking type)	3.0	2.2

Source: Inside Furniture/HFD-Retailing Home Furnishings
November 29, 1982

A recent survey commissioned by Simmons USA revealed that each year one out of every eight U.S. households goes into the bedding market. Survey indications are that couples shopping together for bedding account for 44% of bedding shoppers, females shopping alone and males by themselves represent 34% and 17%, respectively, and the remaining 5% of shoppers are other combinations of persons.

Place of Purchase of Bedding

	% of Purchasers
Furniture stores	44%
Department stores	15
National chains (Sears, Penneys, Wards)	12
Bedding stores	8
Discount stores	3
Other	18

What Purchasers Look For in Bedding

	% of Purchasers
Comfort	96%
Durability	87
Construction features	82
Brand	70
Warranty	70
Price	53

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00) (1983 Edition available now -- 1984 Edition will be available in July, 1984)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics. (May)

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included. (May)

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, $15.00) (July)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label. (September)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers. (March)

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Toiletries, Cosmetics, Fragrances and Beauty Aids

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TOILETRIES, COSMETICS, FRAGRANCES & BEAUTY AIDS

Market Trends

The fragrance, cosmetics and toiletries industry in the U.S., which for years had been characterized by a steady growth rate, began to slow down in the early 1980's. Cosmetics had been considered as one of the few "recession-resistant" industries until the economic downturn in 1981-82. In real terms, eliminating the effects of inflation, consumer spending for cosmetics, fragrances and toiletries in 1982 declined 3.6% compared with the previous year and with 1980.

Not only did consumers have less disposable income to spend on products that are primarily luxuries in 1981-1983, but basic shifts in the market were occuring. Consumers seem to be turning away from medium-price products, buying either better, prestige lines or switching to generic, low-price products. Impulse buying declined as customers weighed price and value.

With an increasingly segmented consumer market, companies have tried to keep list prices down, drawing on the experience in fragrances which saw sales suddenly flatten out as consumers resisted the high prices which had been placed on these products.

The higher-priced, prestige lines are facing an increasing problem with diversion of their products, destined for overseas markets, to discounters and mass merchandisers within the U.S. by wholesalers. This has led some retailers to cut back on stocking lines which are appearing on the shelves of lower-priced competitors. The practice--which some manufacturers are now trying to halt with lawsuits--has been particularly costly for some fragrance lines. Counterfeiting of fragrances is also a problem but this, ironically, is diminishing with the increase in diversions.

Changes in the demographic structure of the population--specifically the aging of the female population as the baby-boom years pass into history--are causing changes in product positioning and strategy. More emphasis is being placed on skin care and hair care products. The growth of women in the labor force has slowed down, and there are now not as many new dollars to draw on; however, this group has special needs and likes, spends more on cosmetics, etc., than non-working women and has been a tremendous boost to the industry.

To solve problems, the industry trend will continue in the direction of consolidation through mergers and acquisitions, in the view of most observers. It will also continue to bring out new products, but probably at a reduced rate and probably specifically targeted to market segments--ethnic groups, teenagers, upper-income, younger women, etc. New product areas that are expected to generate excitement lie in deo-colognes; also in home or environmental fragrances.

Another area that appears promising to marketers is the export market. This will take much effort, however, in view of the recent downturn in exports and in the growth of foreign competition.

On the whole, the outlook for the industry is brighter for 1984 than it was in 1983. The U.S. Bureau of Industrial Economics looks for a real growth in manufacturers' value of shipments (not including inflation) of 2.2%. The value of exports (current dollars) is expected to rise by over 20%; however, imports are expected to gain 36%.

Some segments of the industry will, of course, do much better than others. Fragrance business may pick up in the mass merchandising area, but stronger gains will be found in skin care and hair care products.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The entire complex of suppliers and product developers involved in the output of products in the toiletries, cosmetics, fragrances and beauty aids classification, including those producing components, those involved in repackaging operations, etc., is much broader than the official industry classification, perfumes, cosmetics and other toilet preparations (Standard Industrial Classification 2844) and includes some 800 to 1,000 manufacturers. This Fact File is, however, focused on end-products, manufactured by some 500 companies with industry volume estimated at over $10.2 billion in 1983.

The 1981 Annual Survey of Manufactures compiled by the U.S. Bureau of the Census provides the latest information on the perfumes, cosmetics and toilet preparations industry and is used by the U.S. Bureau of Industrial Economics as a basis for industry projections. The ASM is based on a survey of a sample of manufacturers and is conducted between the complete census of manufacturers compiled every five years. Findings in the ASM is adjusted for comparability with the most recent complete census covering the year 1977.

Industry shipments, according to the Bureau of Industrial Economics, have grown at a compound annual rate of growth of 8.8% from 1972 to 1983 on a current dollar basis, but at a 1.5% rate in terms of a constant dollar, eliminating inflation. A gain of 2.2% on a constant dollar basis is anticipated for the year 1984 compared with 1983.

Perfumes, Cosmetics & Toilet Preparations Industry (SIC 2844*)

	1983(e)	1982(e)	1981	1980	1977
Number of companies	na	na	na	na	644
Number of establishments	na	na	553**	571**	693
Number with 20 or more employees	na	na	254**	231**	192
Payroll (mil. $)	na	na	$ 911.5	$ 853.7	$ 627.9
Valued added by manufacture# (mil. $)	$ 7,020	$6,804	$5,972.8	$5,413.3	$4,526.7
Value of industry shipments## (mil. $)	$10,235.0	$9,395.0	$8,688.2	$7,874.1	$6,557.2
Capital expenditures, new (mil. $)	na	na	197.3	193.1	105.6

na = not available (e) = estimated

(footnotes continued on next page)

GENERAL INDUSTRY STATISTICS

(footnotes continued from previous table)

*Standard Industrial Classification (SIC) 2844. Covers establishments primarily engaged in manufacturing perfumes, cosmetics and toilet preparations. It also includes establishments primarily engaged in blending and compounding perfume bases and those manufacturing shampoos and shaving products, whether from soap or synthetic detergents.

**Includes establishments with payrolls, only, as reported in County Business Patterns (U.S. Bureau of the Census.)

#Value added by manufacture is derived by subtracting the cost of materials, fuel, etc., from the value of shipments and other receipts, with adjustments for finished and work-in-process inventories. It avoids the duplication in evaluating shipments which results from the use of products of some manufacturing establishments as materials by others, and is, for most purposes, the best measure of individual industries.

##Includes both products described as primary to the industry, as well as secondary products and miscellaneous receipts. The amounts shown as value of shipments for each industry and for individual products or classes of products are the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. For value of shipments of specific toilet preparation made by all manufacturers, including those making them as secondary products, see table on page 8.

Source: U.S. Department of Commerce: Bureau of Annual Survey of Manufactures, 1979, 1980, 1981; Bureau of Industry Economics, 1984 U.S. Industrial Outlook.

Employment & Earnings

Employment in the perfume, cosmetics and toilet preparations industry reached a peak of about 66 thousand, on average, in 1983, according to the U.S. Bureau of Labor Statistics. This compares with an annual average of 53 thousand in 1977, 63.4 thousand in 1982.

Based on reports for the first 10 months of the year, production worker employment averaged over 43 thousand in 1983, up from 41.9 thousand in 1982. The annual average in 1977 was only 32.7 thousand.

The indicated gain in average weekly earnings in 1983 compared with the previous year was not as sharp as the rise between 1981 and 1982 (8.6% vs. 10.7%).

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Perfumes, Cosmetics & Toilet Preparations Industry (SIC 2844)

	Jan.-Oct. Average 1983	Jan.-Oct. Average 1982	Percent Change 1983/82	Annual Average 1982	Annual Average 1981	Percent Change 1982/81
Industry total employees (thous.)	65.9	63.5	+ 3.8%	63.4	62.9	+ 0.8%
Production workers (thous.)	43.5	41.9	+ 3.8	41.9	41.6	+ 0.7
Average weekly earnings	$307.84	$283.43	+ 8.6	$268.89	$259.11	+ 3.8
Average hourly earnings	7.79	7.24	+ 7.6	7.30	6.61	+10.4
Average weekly hours	39.4	39.1	+ 0.8	39.3	39.2	+ 0.3
Average overtime hours	2.1	1.9	+10.5	1.9	2.2	-13.6

Source: U.S. Bureau of Labor Statistics, Employment & Earnings

Number of Manufacturing Plants in the Perfumes, Cosmetics, & Toilet Preparations Industry, By Employment Size, 1981
(Includes only plants with payrolls)

	Total Preparations & Cosmetics Plants (SIC 2844) Number	% of Total
Number of plants, total	553	100.0%
By Employment Size:		
Under 10 employees	259	46.8
10-49 employees	157	28.4
50-99 employees	32	5.8
100-499 employees	72	13.0
500 or more employees	33	6.0

Source: U.S. Bureau of the Census, County Business Patterns, 1981.

Concentration in the Industry

A key development in recent years in the industry has been the growing pace of acquisitions and mergers, and most industry observers expect that consolidation among U.S. manufacturers will continue. High profit margins in the industry make the smaller firms attractive acquisition candidates and the high cost of product testing and promotion of new products makes survival difficult for small companies.

The latest report on industry concentration was compiled by the Census Bureau based on the 1977 census of manufactures. This will be updated when 1982 census findings are released. In 1977, the four largest companies controlled 40% of total industry shipments.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Levels in the Perfumes, Cosmetics & Toilet Preparations Industry, 1972, 1977

	Value of Industry Shipments (Mil. $)	Percent Accounted for By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Toilet preparations & cosmetics (SIC 2844)					
1977	$6,557.2	40	56	74	90
1972	4,053.0	38	53	74	91

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977
Concentration Ratios in Manufacturing
MC77-SR-9

As part of the 1978 Annual Survey of Manufactures, the publication, Statistics for States SMSA's, Counties and Cities (discontinued in subsequent years) contained data on toiletries and cosmetics by leading states.

According to the survey, plants in New Jersey accounted for 20.1% of industry shipments in 1978, with a total of $1.5 billion. New Jersey was also the leader as far as the number of employees were concerned accounting for nearly one-third of the industries total.

Leading States in the Manufacture of Perfumes, Cosmetics & Toilet Preparations, 1978

	Value of Industry Shipments		Value Added By Manufacture		
	Mil. $	% of Total	Mil. $	% of Total	Employees (Thous.)
Industry shipments, U.S. Total	$7,228.1	100.0%	$4,957.2	100.0%	54.1
Leading states					
New Jersey	1,456.1	20.1	978.4	19.7	16.7
Ohio	1,085.0	15.0	872.9	17.6	2.9
New York	1,082.4	15.0	809.3	16.3	7.4
California	418.0	5.8	286.4	5.8	6.4

Source: U.S. Bureau of the Census,
1978 Annual Survey of Manufactures,
Statistics for States, Standard Metropolitan Statistical Areas, Large Industrial Centers And Selected Cities M78(AS)-6.

GENERAL INDUSTRY STATISTICS

Manufacturers' Financial & Operating Ratios

Despite the economic climate in 1983, the industry was able to increase profits, from 5.8% in 1982 to 6.3%. This was, however, considerably below the 7.9% level reached in 1979 (1984 U.S. Industrial Outlook).

Selected Key Business Ratios for the Perfume, Cosmetics & Toilet Preparations Industry, 1980
(Median Figures)

	Toilet Preparations & Cosmetics (SIC 2844)
Number of firms reporting	61
Current assets to current debt (times)	2.36
Net profits on net sales (%)	3.94%
Net profits on net worth (%)	16.73%
Net sales to inventory (times)	6.4

Source: Dun & Bradstreet, Inc.
Business Economics Division,
Key Business Ratios,
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LEADING MANUFACTURERS

Forbes magazine, in its annual report on American Industry reported that the return on equity over the last five years for the leading toiletries and cosmetics companies was 18.7%, well above the all-industry median of 15.1%.

Sales growth over the last five years, however, averaged 11.2%, a total slightly below the all-industry median of 12.4%.

Revlon, according to Forbes, had the highest five-year average sales growth rate of the measured toiletries and cosmetics companies, with a total of 17.5%. In second place was Chesebrough-Ponds with an average of 14.3%.

Five Year Average Growth & Profitability Ratios of Leading Toiletries & Cosmetic Companies

			Profitability			
	Sales Growth		Return on Equity		Return on Total Capital	
	5 Year Average	5 Year Rank	5 Year Average	5 Year Rank	5 Year Average	5 Year Rank
Revlon	17.5%	1	14.7%	7	12.7%	7
Chesebrough-Pond's	14.3	2	21.3	3	17.5	3
Avon Products	12.1	3	23.5	1	23.1	1
Procter & Gamble	11.3	4	19.7	4	15.4	4
Kimberly-Clark	11.2	5	17.9	6	13.9	6
International Flavors & Fragrances	9.7	6	21.3	2	20.1	2

(continued)

LEADING MANUFACTURERS

Five Year Average Growth & Profitability Ratios of Leading Toiletries & Cosmetic Companies
(continued)

	Sales Growth		Profitability			
			Return on Equity		Return on Total Capital	
	5 Year Average	5 Year Rank	5 Year Average	5 Year Rank	5 Year Average	5 Year Rank
American Cyanamid	9.4	7	11.5%	9	8.9%	9
Gillette	8.3	8	18.7	5	13.9	5
Colgate-Palmolive	7.5	9	14.3	8	11.7	8
Industry median	11.2		18.7		13.9	
All-industry median	12.4		15.1		10.8	

Source: "36th Annual Report on American Industry," Forbes, January 2, 1984

After years of record growth as the largest U.S. manufacturer of makeup and fragrances sold at retail, Revlon's domestic sales dropped from $820.7 million in 1981 to $791.3 million in 1982; operating profits declined from $185.8 million in 1981 to $110.7 million in 1982.

In the first nine months of 1983, Revlon's sales were up only 1%; however, with stepped up promotions and the development of a new shampoo, the company hopes to register an 8% increase in volume in 1984.

Other large U.S. manufacturers are aggressively aiming at specific market segments. Noxell Corp.--marketer of Noxzema and the Cover Girl brands of makeup and skin cream--has found success in the mass market's teenager segment. While suppliers of higher-priced lines, such as Revlon, ran into trouble in 1982, Noxell's sales gained 12.3%, reaching $261.9 million. Cover Girl is reported to have almost a 14% share of the lower-price cosmetic market, and growing faster in both dollar and unit sales than Maybelline, which holds an 18% share.

Estée Lauder is reported to have the largest share of the skin-care segment of the cosmetics business, which was valued at $2.6 billion in 1983. Lauder may be close to edging out Revlon as the industry's retail leader, in the view of some observers. This maker focuses on the more affluent women who shop in department stores, and it is reported that the Estée Lauder brand has garnered 36% of available department store selling space for cosmetics and toiletries.

Third in importance in the department store trade, after Revlon and Lauder, is Lancôme, the skin-treatment and coloring line of L'Oréal, the French manufacturing giant. Other L'Oréal products are making good progress in the U.S. market.

PRODUCTION LEVELS

The overall level of physical output of U.S. industries is measured in Federal Reserve Board indexes of production. According to this source, production of soaps and toiletries in 1983 gained 5.0% over 1982, reversing the decline in output in 1982, which was 3.1% below 1981 and about equal with the 1979 level.

The Production Index for all consumer goods in 1983 advanced 7.3% over the 1982 level.

Industrial Production Indexes, 1979-1983
(1967 = 100)

	1983	1982	1981	1980	1979
Total industrial production	147.6	138.6	151.0	147.0	152.5
All consumer goods	151.8	141.5	147.9	145.4	148.6
Soaps & toiletries	180.1	171.5	177.0	147.5	171.5

Source: Board of Governors,
Federal Reserve System,
G.12.3

VALUE OF SHIPMENTS

The value of shipments of fragrances, toiletries and cosmetics, including both consumer and professional products, shipped by all U.S. producers was reported at $10.9 billion in 1983, up from $10.0 billion in 1982, by the U.S. Bureau of Industrial Economics (1984 U.S. Industrial Outlook). In the period 1972-1983, shipments grew at a 9.0% compound annual rate on a current dollar basis. When adjusted for inflation, however, the rate of growth for the period declined to 1.7%. An increase of 2.2% in value of shipments in real dollar terms is looked for by the Bureau for 1984 compared with 1983.

The latest year for which data are available on the value of shipments of individual product categories is 1981, as noted below.

Value of Major Product Classifications Shipped By All
U.S. Producers, 1977, 1980, 1981
(Millions of Dollars)

	1981	1980	1977	% Change 1981/80	% Change 1981/77
Toilet preparations, total	$9,247.5	$8,258.8	$6,393.5	+ 12.0%	+ 44.6%
Shaving preparations	304.0	270.9	268.2	+ 12.2	+ 13.3
Perfumes, toilet water & colognes (men's & women's)	1,650.8	1,468.4	1,096.8	+ 12.4	+ 50.5
Hair preparations, incl. shampoos	2,123.2	2,002.7	1,474.9	+ 6.0	+ 44.0
Dentrifaces, mouthwashes, gargles & rinses	1,142.2	916.0	659.6	+ 24.7	+ 73.2
Other cosmetics & toilet preparations	3,730.8	3,342.0	2,597.4	+ 11.6	+ 43.6
Toilet preparations, n.s.k.	296.5	258.8	296.6	+ 14.6	--

n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1981

VALUE OF SHIPMENTS

Industry revenues in fragrances peaked in 1976 with total sales for women's fragrances by manufacturers amounting to $625 million. As fragrance manufacturers began to increase their prices, reaching double digit increases in 1978, volume declined. Rapidly increasing prices coincided, unfortunately, in the decline in real disposable household income which resulted in a decline in impulse purchases and some discontinuance of fragrance as a gift item. Excessive inventories at the retail trade became a problem, added to reluctance on the part of retailers to stock lines that were being diverted by wholesalers to discounters and mass merchandisers.

The same problems to varying degrees affected other producers of toiletries and cosmetics in recent years. The sharp rise in imports and decline in exports, due primarily to the strong U.S. dollar which raised prices abroad, along with the U.S. recession have generally resulted in a flat performance in U.S. manufacturers' product shipments.

In the face of current market conditions, consolidation in the industry will continue, not only involving mergers and acquisitions, but with greater emphasis on fewer new products.

The 50 largest companies in the toilet preparations and cosmetics industry in 1977 accounted for 87% of the value of product shipments, almost identical to the 88% reported for the 50 largest companies in 1972.

The larger companies control an inordinately large amount of product shipments in the industry, particularly in the dentrifaces area, where the four largest companies represent 87% of the value of product shipments.

Concentration Ratios in the Manufacture of Toilet Preparations, 1972, 1977

	Value of Product Shipments (Mil. $)	Percent Accounted For By:			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Toilet preparations					
1977	$6,393.5	37	51	70	87
1972	4,244.5	37	50	73	88
Shaving preparations					
1977	268.2	47	73	97	99+
1972	250.4	57	77	96	99+
Perfumes, toilet water & cologne					
1977	1,096.8	54	69	89	99
1972	674.6	48	61	85	97
Hair preparations, incl. shampoo					
1977	1,474.9	50	67	88	97
1972	1,065.0	46	63	86	96

(continued)

VALUE OF SHIPMENTS

Concentration Ratios in the Manufacture of Toilet Preparations, 1972, 1977
(continued)

	Value of Product Shipments (Mil. $)	Percent Accounted for By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Dentrifaces, incl. mouthwashes, gargles & rinses					
1977	$ 659.6	87	97	99+	100
1972	484.6	79	95	99	99+
Other cosmetics & toilet preparations					
1977	2,597.4	39	56	79	95
1972	1,674.0	45	61	82	96

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing
MC77-SR-9

FOREIGN TRADE

Poor economic conditions in Europe and in South America, and the strong American dollar which makes U.S. products comparatively expensive abroad, as well as competition from foreign producers in Japan and elsewhere, had a serious impact on the fragrance, toiletries, cosmetics industry in the U.S.

From a value of $53.9 billion in 1972, exports of these products skyrocketed to $350 million in a decade and growth seemed assured. By early 1984 the Commerce Department had scaled down their estimates for 1983 exports to $320 million.

To make matters worse, 1983 imports of cosmetics, etc., were almost double the figure originally estimated by the Commerce Department and climbed to $104 million.

U.S. Foreign Trade in Toiletries, Cosmetics, Fragrances
Trends & Projections, 1972-1984
(Millions of Dollars)

	1972	1981	1982	1983*	Compound Annual Growth Rate 1972-1983	Projected 1984
Value of exports	$ 53.9	$370.8	$352.7	$320.0	17.6	$385.0
Value of imports	20.0	102.7	123.6	188.8	22.6	255.0
Export/shipment ratio	0.013	0.040	0.035	0.029	--	--
Import/new supply ratio#	0.005	0.011	0.001	0.017	--	--

* Estimated
# New supply is the sum of product shipments plus imports.

Source: Bureau of the Census and Bureau of Industrial Economics.

FOREIGN TRADE

The products most responsible for the import growth rate are fragrances and cosmetics. If the trend in imports vs. exports continues at its present pace, a deficit in foreign trade in the cosmetics/fragrance/toiletries field could result as early as 1988.

Over the first 10 months of 1983, exports of these products fell 11.2%, while imports gained 34.7%. Canada is currently the largest importer of these products from the U.S.

PRODUCER PRICE INDEX

Between November of 1982 and November of 1983, the producer price index for cosmetics and toilet preparations fell 5.9%, while the index for all commodities registered a gain of 1.7%. The largest decline for any reported category was in aftershave preparations which registered a decline of 8.3%. The largest increase during the twelve month period was for cleansing creams which marked a gain of 16.1%.

Between 1981 and 1982, while the index for all commodities had a minimal gain of 2.1%, the index for toiletries and cosmetics went up a whopping 22.7%.

Producer Price Index for Specified Toiletries & Cosmetics
(1967 = 100, unless otherwise indicated)

	November Average			Annual Average		
	1983	1982	% Change 1983/82	1982	1981	% Change 1982/81
All items	305.6	300.4	+ 1.7%	299.3	293.0	+ 2.1%
Cosmetics & toilet preparations	213.2	226.6	- 5.9	225.2	208.0	+ 8.3
Shaving preparations**	118.7	122.7	- 3.3	128.0	108.2	+18.3
Shaving soap & cream	na	256.8	na	260.4	234.8	+10.9
Aftershave preparations*	173.8	189.6	- 8.3	201.3	164.3	+22.5
Perfume, cologne & toilet water**	131.1	130.9	+ 0.2	127.3	112.9	+12.8
Perfume	307.3	298.5	+ 2.9	299.9	263.2	+13.9
Cologne & toilet water**	233.2	239.2	- 2.5	225.5	202.2	+11.5
Hair preparations	116.1	113.3	+ 2.5	109.3	103.3	+ 5.8
Soap shampoo	151.7	148.6	+ 2.1	145.9	135.3	+ 7.8
Synthetic organic detergent shampoo**	100.7	100.8	- 0.1	103.7	105.3	- 1.5
Hair tonics, incl. conditioners	252.9	235.2	+ 7.5	237.3	217.0	+ 9.4
Hair dressings**	135.9	128.3	+ 5.9	123.2	110.6	+11.4
Hair spray (aerosol)*	na	283.2	na	267.0	248.7	+ 7.4
Home & commercial permanents	234.8	229.9	+ 2.1	221.0	na	--
Creams**	132.7	121.6	+ 9.1	126.1	117.3	+ 7.5
Cleansing creams	390.6	336.3	+16.1	340.8	296.4	+15.0
Foundation creams**	119.8	115.0	+ 4.2	114.6	108.1	+ 6.0
Lubricating creams**	139.4	125.9	+10.7	139.8	130.5	+ 7.1
Other creams**	119.4	113.8	+ 4.9	113.3	107.3	+ 5.6

(continued)

PRODUCER PRICE INDEX

Producer Price Index for Specified Toiletries & Cosmetics
(1967 = 100, unless otherwise indicated)
(continued)

	November Average			Annual Average		
	1983	1982	% Change 1983/82	1982	1981	% Change 1982/81
Lotions & oils**	122.2	115.5	+ 5.8%	116.7	110.5	+ 5.6%
Suntan & sunscreen**	111.8	106.7	+ 4.8	106.5	104.6	+ 1.8
Hand lotions	181.4	156.7	+15.8	168.4	151.6	+11.1
Other lotions & oils**	116.7	na	na	116.1	107.5	+ 8.0
Cosmetics**	129.7	122.2	+ 6.1	125.9	116.4	+ 8.2
Lip preparations	212.9	203.7	+ 4.5	205.6	180.7	+13.8
Blushes**	124.8	119.3	+ 4.6	117.1	107.4	+ 9.0
Eye preparations*	146.6	135.7	+ 8.0	144.0	142.1	+ 1.4
Deodorant**	120.4	115.7	+ 4.1	116.8	108.3	+ 7.8
Aerosol underarm deodorant	219.2	212.5	+ 3.2	217.0	201.7	+ 7.6
Cream, liquid & roll on	131.5	122.9	+ 7.0	119.3	108.6	+ 9.9
Manicure preparations	na	96.8	na	95.4	94.3	+ 1.2
Nail lacquer & enamel	na	157.7	na	155.7	147.0	+ 5.9
Powders**	134.3	125.0	+ 7.4	123.2	114.0	+ 8.1
Face powder	256.3	240.4	+ 6.6	230.6	205.6	+12.2
Wet application powder**	127.0	na	na	120.7	108.3	+11.4
Bath oils & salts*	na	132.7	na	145.0	143.4	+ 1.1

* = 12/71 = 100
** = 6/80 = 100

Source: Bureau of Labor Statistics

NATIONAL ADVERTISING

As one of the most competitve of all consumer product groups, the cosmetics, fragrance and toiletries industry must encompass extraordinarily high advertising and promotion budgets--particularly now in launching new products in generally crowded fields.

The perfumes, cosmetics and toilet preparations industry ranks second among all U.S. industries in terms of media advertising expenses as a percentage of sales, according to an analysis by the Federal Trade Commission. In terms of selling expenses as a whole, including advertising, plus salespeople, promotions, etc., the industry ranks third.

Proprietary drugs outranked the industry in terms of media advertising expense and selling expense--with first position on both counts. Baked goods ranked second in selling expense as a percentage of sales.

NATIONAL ADVERTISING

Perfumes, Cosmetics & Toilet Preparations Percentage of Sales Accounted For By Media Advertising Expense & By Total Selling Expense

	% of Sales
Total selling expenses	29.5
Media advertising expenses	14.3

Source: Federal Trade Commission: Annual Line of Business Report, 1976

Although the market for most product categories is huge, the majority of products have generally passed the stage of rapid growth. Gaining market share means persuading customers to switch brands, rather than try a completely new product.

To an increasing extent, promotions are being carefully orchestrated to reach a specific market segment--such as women in their thirties, targets for Richardson-Vicks' promotions on Oil of Olay; the target for Noxell's Cover Girl: teenagers; the upscale market for Lancôme's L'Oréal line.

It is not unusual for over $20 million to be spent on a new shampoo or hair care product. In fact, it has been reported that Revlon will spend $25 million in 1984 --its biggest campaign ever--to launch a new prestige shampoo (Hair's Daily Requirement).

In 1982, hair care marketers spent some $275 million in ads and at least $150 million in store promotions and samples. To an increasing extent, manufacturers are promotiong complete lines of hair and other products, to win acceptance of complete personal care systems. Gifts-with-purchase or reduced-price gifts with purchase are important parts of the promotions of many manufacturers.

Warner cosmetics spent more on advertising its Vanderbilt perfume line in 1982 than any other company spent on any single brand of perfume or toilet water. Warners expenditures on Vanderbilt represented 6.6% of all advertising for perfumes and toilet waters in 1982. Chanel perfume was the second most advertised brand of toilet water and cologne.

The top ten brands represented 46% of all dollars spent on advertising of toilet water and perfumes in 1982 with expenditures of nearly $45 million.

NATIONAL ADVERTISING

Media Expenditures for Perfumes & Toilet Waters by Major Advertisers
(Six-Media Totals)
(Thousands of Dollars)

Perfume Brand	1982 Total	% of Total Media Expenditures for Perfumes & Toilet Waters
Vanderbilt	$ 6,472.9	6.6%
Chanel	5,878.1	6.0
Sophia	5,367.4	5.5
Charlie	4,652.2	4.7
Daydreams	4,161.4	4.3
Cenchal	4,137.1	4.2
Jontue	3,756.9	3.8
Emeraude	3,748.4	3.8
Nuance	3,545.8	3.6
White linen	3,159.9	3.2
Top ten, total	44,880.1	46.0

Source: Leading National Advertisers

Old Spice cologne had the most dollars spent on advertising in 1982, accounting for 12.0% of all advertising dollars for men's toiletries. A distant second was garnered by Stetson cologne with 7.1% of the total.

Media Expenditures for Men's Toiletries by Major Advertisers
(Six-Media Totals)
(Thousands of Dollars)

Men's Toiletries Brand	1982 Total	Percent of Total Media Expenditures for Men's Toiletries
Old Spice Cologne for Men	$ 7,735.1	12.0%
Stetson Cologne for Men	4,559.5	7.1
Mennen Skin Bracer	3,494.5	5.4
Chaps Cologne for Men	3,449.8	5.4
Aqua Velva Aftershave	3,282.8	5.1
Aramis & Devin Men's Cologne	2,542.7	4.0
English Leather Cologne	2,407.9	3.8
Blue Stratos Aftershave/Cologne	2,287.3	3.6
Edge Shaving Gel	2,087.2	3.3
Brut Toiletries for Men	2,083.1	3.2
Top ten, total	33,929.9	52.9

Source: Leading National Advertisers

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The aging of the "baby boomers"--people born in the 1950's and 1960's--has many ramifications for marketers of fragrances, toiletries and cosmetics. The number of women in the principal target group, teenagers and young women, is now beginning to decline. By 1990, according to Census Bureau projections, the number of women 16 to 19 years of age in the U.S. population will register a decline of almost 4% compared with 1983; the number 20 to 34 years of age will drop by 14.5%.

Over the next 25 years, the fastest growing age group will be age 35-54 years. Women of this age will gain 54.2% by the year 2000 compared with the number in 1983; the count for men of the same age will be up 58.1%.

In view of this development, the industry will be changing their product mix--focusing increasingly on skin treatment and moisturizing products, wrinkle removers and smoothers, and the like.

Projections of the U.S. Female Population, 1983, 1990, 2000

	Number (thousands)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
Total, all ages	120,217	128,234	137,611	+ 14.5%	100.0%	100.0%	100.0%
Under 16 years	26,924	28,240	29,175	+ 8.4	22.4	22.0	21.2
16 years & over	93,293	99,994	108,436	+ 16.2	77.6	78.0	78.8
16-19 years	7,654	6,704	7,373	- 3.7	6.4	5.2	5.4
20-34 years	30,925	30,774	26,442	- 14.5	25.7	24.0	19.2
35-44 years	14,940	19,119	21,885	+ 46.5	12.4	14.9	15.9
45-54 years	11,518	13,051	18,925	+ 64.3	9.6	10.2	13.7
55 years & over	28,256	30,346	33,811	+ 19.6	23.5	23.7	24.6
Median age (years)	32.2	34.3	37.7	+ 17.1			

NOTE: These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

The Male Population of the U.S., 1983 & Projections to 2000*

	Number (thousands)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
Total, all ages	113,977	121,498	130,379	+ 14.4%	100.0%	100.0%	100.0%
Under 16 years	28,180	29,591	30,592	+ 8.6	24.7	24.4	23.5
16 years & over	85,797	91,907	99,787	+ 16.3	75.3	75.6	76.5
16-19 years	7,958	6,999	7,709	- 3.1	7.0	5.8	5.9
20-34 years	31,162	31,301	27,071	- 13.1	27.3	25.8	20.8
35-54 years	25,302	31,066	40,002	+ 58.1	22.2	25.5	30.7
55 years & over	21,376	22,541	25,005	+ 17.0	18.8	18.5	19.1
Median age (years)	29.6	31.8	34.9	+ 17.9			

*Middle series (out of three) projections based on varying assumptions on fertility, mortality and emigration.

Source: U.S. Bureau of the Census,
Series P-25, No. 922
(October 1982).

CONSUMER EXPENDITURES

According to the Bureau of Economic Analysis (U.S. Department of Commerce), the total value at retail of toilet articles and preparations of all types reaching the consumer in 1982, excluding spending in beauty shops, barbershops and other beauty establishments and health clubs, amounted to $16,898 million. On a current dollar basis, this represented a gain of 4.9% compared with 1982.

On a constant dollar basis, eliminating inflation, spending in 1982 registered a 3.6% decline compared with spending in 1972. Price increases have masked the fact that unit sales in the fragrance and cosmetics industry have been declining in recent years, continuing into 1983. The recent recession accelerated a growing resistance on the part of consumers to impulse buying and increased interest in real product values rather than glamour or prestige.

Personal Consumption Expenditures for Toilet Articles & Preparations, 1979-1982

	1982	1981	1980	1979	% Change 1982/ 1981	% Change 1982/ 1979
Total (millions of current $)	$16,898	$16,115	$14,664	$13,600	+ 4.9%	+24.2%
% of total personal consumption expenditures	0.85%	0.88%	0.88%	0.90%	--	--
Total (billions of 1972 $)	$ 8.0	$ 8.3	$ 8.3	$ 8.4	- 3.6%	- 4.8%

Source: Based on U.S. Department of Commerce, Bureau of Economic Analysis data

Spending By Product Type

Official figures on retail sales of specific product categories in the fragrance, cosmetics, toiletries classification are lacking, and market information must be based on an evaluation of data compiled by a number of trade sources. The problem of arriving at an acceptable overall figure is complicated by the fact that there is no uniform definition of products to be included in the category among the diverse types of retail outlets in the market from drug stores to department stores.

The trade publication, Product Marketing, compiles annual estimates of consumer spending by product which are described as estimates of retail sales based on variations by product distribution in various classes of trade, with projections taking into account differences in retail markups, etc. The figures, it is pointed out, should be considered indicative, rather than definitive.

According to Product Marketing, the total volume at retail of cosmetics, fragrances and toiletries amounted to $13.8 billion in 1982, up from $12.9 billion in 1981 and $9.3 billion in 1978.

The largest segment of this market was composed of cosmetics ($3.6 billion in 1982), followed by hair products ($2.7 billion), according to this source.

CONSUMER EXPENDITURES

Spending By Product Type

Estimated Volume At Retail, 1978-1982
(Millions of Dollars)

	1982	1981	1980	1979	1978
Cosmetics, fragrances, etc., total	$13,798.3	$12,872.1	$11,440.1	$10,256.9	$9,263.8
Cosmetics	3,584.2	3,454.9	3,012.5	2,656.7	2,261.9
Fragrances, women's	2,187.8	2,123.7	1,974.2	1,828.3	1,643.6
Hair products	2,679.5	2,321.6	2,070.3	1,913.4	1,820.1
Men's toiletries	918.0	879.7	850.8	852.0	752.5
Skin preparations	2,498.1	2,352.0	1,965.6	1,552.4	1,365.1
Personal cleanliness (bath soaps, external deodorants)	1,930.5	1,740.3	1,556.8	1,454.1	1,420.5

Source: Product Marketing, 36th Annual Consumer Expenditure Study (August 1983 Issue)

Estimated Consumer Expenditures For Specified Product Classifications
1981, 1982
(Millions of Dollars)

	1982	1981	% Change 1982/1981
Total, all products	$13,798.3	$12,872.1	+ 7.2%
Cosmetics, total	3,584.2	3,454.9	+ 3.7
Make-up preparations	1,097.1	1,075.4	+ 2.0
Lipsticks	523.3	496.5	+ 5.4
Lip gloss	135.7	163.9	- 17.2
Eye make-up	1,033.0	982.0	+ 5.1
Nail products	585.5	557.9	+ 4.9
Other, including accessories	209.7	179.1	+ 17.1
Fragrances, women's, total	2,187.8	2,123.7	+ 3.0
Perfume	205.4	216.6	- 5.2
Toilet water, cologne	1,446.1	1,364.4	+ 6.0
Gift sets	225.4	246.9	- 8.7
Scented bath products	220.7	207.9	+ 6.2
Bubble bath	90.2	87.9	+ 2.6
Personal cleanliness, total	1,930.5	1,740.3	+ 10.9
Bath soaps	1,156.8	1,032.0	+ 12.1
External deodorants	773.7	708.3	+ 9.2

(continued)

CONSUMER EXPENDITURES

Spending By Product Type

Estimated Consumer Expenditures For Specified Product Classifications
1981, 1982
(Millions of Dollars)
(continued)

	1982	1981	% Change 1982/1981
Men's toiletries, total	$ 1,050.1	$ 1,001.3	+ 4.9%
Colognes	225.9	210.7	+ 7.2
Talcum powder	6.9	7.0	- 1.4
Gift sets	97.7	114.3	- 14.7
Regular/gel	75.5	71.3	+ 5.9
Hair coloring	27.5	26.2	+ 5.0
Shave cream	165.4	151.3	+ 9.3
Other shave products	237.5	222.6	+ 6.7
Skin treatment products	6.0	6.2	- 3.2
Skin preparations, total	2,498.1	2,352.0	+ 6.2
Suntan, sunscreen products	203.4	196.8	+ 3.4
Hair products, women's	2,679.5	2,321.6	+ 15.4
Shampoos	1,028.6	983.1	+ 4.6
Conditioners	395.9	na	--
Dressings, fixatives	464.3	412.5	+ 12.6
Color preparations	562.8	505.8	+ 11.3
Home permanents	111.1	102.8	+ 8.1
Straighteners	52.1	42.2	+ 23.4
Wave sets	23.5	21.4	+ 9.8
Ethnic wave products	41.1	na	--

na = not available

Source: Product Marketing, 36th Annual Consumer Expenditure Study
(August 1983 Issue)

FRAGRANCES

The retail market for fragrance products is currently estimated by various trade sources at from $2.4 billion to $3 billion. It is generally agreed, however, that business has been flat in recent years. Considering inflation and price increases, the decline in consumption of fragrance products has been significant.

Unit sales in 1982 were reported to have dropped 5%. The era of fast growth, when the baby-boom generation sent sales soaring, has passed. Within the industry manufacturers are now trying to carve out special niches, such as the musk segment which registered a $100 million retail volume in 1982 and which showed unit growth reported at about 6% to 7% a year compared with flat overall unit growth in the fragrance market.

Spending By Product Type

FRAGRANCES (continued)

The industry has also consolidated lines, eliminating weak brands. The top seven women's fragrance companies--Avon, Revlon, Estée Lauder, Prince Matchabelli, Charles of the Ritz Group, Jacqueline Cochran and Coty--accounted for 54% of sales in 1980 compared with 49% in 1970. In the men's fragrance industry, the six leading companies accounted for 60% of total business in 1980, up from 43% in 1970, according to an analysis by Salomon Bros.

The Fragrance Foundation has estimated retail sales of women's fragrance products in 1983 at $1,700 million, men's, $800 million.

Estimated Retail Sales of Fragrance Products
(Perfumes, Colognes, Toilet Water)
(Millions of $)

Year	Total	Women's	Men's
1983	$2,500	$1,700	$ 800
1979	2,150	1,300	850

Source: The Fragrance Foundation

Some excitement in the fragrance segment is being generated by two new areas that are expected to show good growth in the next few years: deo-colognes (body sprays combining fragrance with deodorants) and the home or environmental fragrance area--served by a variety of new products coming on the market--ranging from fragrance disc players to sprays.

Lever Brothers was first in introducing a deo-cologne (Impulse) in the U.S. market in 1982; other manufacturers are following. Gillette is reported to be planning to spend $11 million in 1984 to introduce Body Flowers, and analysts expect sales to reach $80 million.

A major problem in the fragrance industry is diversion of prestige brands. This is primarily due to the switching of overseas shipments by wholesalers to unauthorized outlets within the U.S.--mainly discounters, chains and mass merchandisers. These outlets, normally denied access to prestige fragrance and cosmetics lines, are able to obtain them from diverters and are cutting gross margins in upscale categories to below 20%. U.S. fragrance manufacturers claim to have lost $280 million in sales in 1982 due to the abundance of diverted goods in the U.S. market.

It is reported that diversion deals are also being worked out by some fragrance manufacturers, and even high-end retailers with overstock, as well as by wholesalers and distributors. At the same time, some fragrance houses are purposely widening distribution to increase sales. Selling to the mass market may help increase sales, but it generally makes the life cycle shorter for the high-end, prestige brand.

CONSUMER EXPENDITURES

Spending By Product Type

HAIR CARE

The market for hair care items is polarized--with price brands on one end, upscale on the other. It is a very large market,getting very crowded with many competitors. Hair care item sales are dominated by three outlet types: drug stores, supermarkets and mass merchandisers--but to varying degrees, depending on the product. Private labeling in the hair care market is expanding rapidly.

Drug stores are the leading outlet for hair coloring products and home permanents, according to A.C. Neilsen. Supermarkets hold about a 50% share of shampoos sales, hair fixatives and hair preparations. Drug stores are the leading outlet for hair coloring and home permanents. Mass merchandisers generally rank third, after drug stores and supermarkets in the sale of hair care products.

Upscale department stores are also getting into the hair care market as manufacturers expand their lines. Revlon in 1984 will launch a new $3.50 shampoo (Hair's Daily Requirement) with its biggest ad campaign, pegged at $25 million.

According to an industry analysis by Forbes (December 6, 1982) something like 75 new hair care products come onto the market every year. Competitive pressure is so great, however, that about an equal number are pushed out of the market. The shampoo segment is the largest, with retail volume of $1.1 billion a year, but growing at a relatively slow (7%) rate. The conditioner market ($700 million) is reported to be showing a 13% growth rate. No one brand controls more than 10% of the shampoo or conditioner market, but the market is huge and a percentage point covers a lot of dollars.

Of the $3 billion retail market for hair care products, over $700 million, or 23%, is accounted for by sales to blacks, who constitute only 12% of the population. The rapidly growing demand for ethnic hair preparations has resulted in expansion into this category by supermarkets which are becoming the leading outlet type.

DEODORANTS

The $1.1 billion deodorant market has been under pressue in recent years to bring out new products in the face of consumer resistance to aerosol products because of a fear that fluorocarbons might damage the atmosphere. This has resulted in Right Guard (Gilette) sprays' market share declining from 26% in 1966 to 8.6% in 1982. A product overhaul has, however, resulted in a pickup in market share to over 9%.

COSMETICS/SKIN CARE

The cosmetics/skin care market, valued at retail at $11 billion, has registered a divergent trend. In 1983 the lower end of the line was weak, while prestige, higher-priced lines were reported to have done well.

CONSUMER EXPENDITURES

Spending By Product Type

COSMETICS/SKIN CARE (continued)

The future strength in this market is seen in the development of products for aging skins, as the bulk of population growth trends shifts away from the youth market.

RETAIL SALES BY TYPE OF OUTLET

Manufacturers selling prestige fragrances and cosmetics lines must usually lease counter space for their lines in department stores and large specialty stores, keep large inventories on hand, pay commission to sales people.

As previously noted, higher-priced, prestige lines are faced with a growing problem of diversion of their products from the normal pipeline to upscale stores to supermarkets and discounters. This has led to some reluctance on the part of the prestige retailers to stock full inventories.

Market share by outlet type varies widely by product price line and by category. In general, department stores and specialty stores are the dominant outlets for higher-priced cosmetics, fragrances and toiletries; supermarkets, drug stores and mass merchandisers are the main outlets for lower-priced lines and for staples, such as hair and nail care products.

Supermarkets

As supermarket managements have become increasingly beset by smaller profit margins on food products, and by changes in consumption patterns brought on by the fast food chains, they have put more emphasis on beauty aids which offer more substantial markups.

Hair care ranks among the top volume and profit producers for supermarkets, and in 1982, according to Chain Store Age/Supermarkets represented 16% of the total H&BA category. Although accounting for only 3.6% of total H&BA sales in 1982, cosmetics showed strong growth in supermarkets in 1982, climbing 32% to reach a total sales volume of $362 million.

It has been reported that food stores' share of cosmetics sales reached almost 26% in 1982, with unit share approaching 17%. An industry observer forecasts that by 1985-86, supermarkets' share of the drug/food/mass merchandiser cosmetics business will hit 20%. More supermarkets are getting into cosmetics as they are able to obtain major lines and to use modular units for display.

RETAIL SALES BY TYPE OF OUTLET

Supermarkets

Toiletries/Cosmetics Sales in Supermarkets, 1981, 1982

	Millions of $		% of Total Health & Beauty Aids Dept. Sales	
	1982	1981	1982	1981
Hair care	$1,582.8	$1,499.3	15.5%	16.7%
Creams, lotions	556.1	519.5	5.5	5.8
Men's toiletries*	125.2	119.9	1.2	1.3
Cosmetics	362.0	275.0	3.6	3.1
Deodorants, etc.	698.9	583.3	6.9	6.5
Total	$3,325.0	$2,997.0	32.7	33.4

* Excluding shaving cream, razor blades, razors.

Source: Chain Store Age/Supermarkets (July 1983)
(Covering supermarkets with a total volume of $2 million and up)

Drug Stores & Grocery Stores

Estimated Share of Retail Sales of Specified Toiletries & Cosmetics Accounted for by Drug Stores & Grocery Stores, 1982

	% in Drug Stores	% in Grocery Stores
HAIR PRODUCTS		
Haircoloring preparations	63%	15%
Shampoos	30	59
Women's hair dressings & conditioners	37	45
Women's hair sprays	31	46
Men's hair dressings	50	49
Cream rinses	37	54
Home permanent kits & waveset preparations	54	30
Hair brushes	21	32
Hair combs	23	11
SHAVING PRODUCTS		
Shaving cream	45	44
After-shave lotions	41	32
Pre-shave lotions	41	41
COSMETICS PRODUCTS		
Eye make-up products	35	19
Make-up bases	20	5
Pressed cake powder & blush make-up	25	5

(continued)

Drug Stores & Grocery Stores

Estimated Share of Retail Sales of Specified Toiletries & Cosmetics Accounted for by Drug Stores & Grocery Stores, 1982

(continued)

	% in Drug Stores	% in Grocery Stores
SKIN CARE PRODUCTS		
Face creams	30%	20%
Face lotions & astringents	40	11
Hand & body lotions	35	38
Liquid facial cleansers	32	28
Talcum & body powders	40	12
Lip protectors	61	27
Suntan oils & lotions	45	17
FRAGRANCES & COLOGNES		
Women's fragrances, toilet water & colognes	30	na
Perfumes	20	na
Men's fragrances	44	na
Men's colognes	60	6
PERSONAL DEODORANTS & ANTIPERSPIRANTS		
Aerosols	31	30
Roll-ons	34	43

na = not available

Source: Drug Topics (July 4, 1983); Supermarket Business, 36th Annual Consumer Expenditures Study, (September 1983)

RETAIL SALES BY TYPE OF OUTLET

Department Stores

In 1982, cosmetics, fragrances and toiletries sales in department stores registered a typical (median) gain of 11.3% over 1981 according to the annual Merchandising and Operating Results report issued by the National Retail Merchants Association. This was well above the typical 3.8% increase in sales for all upstairs departments in these stores. At $256, sales per square foot are much higher in the cosmetics, fragrances and toiletries department than for the upstairs store as a whole ($109).

Merchandising & Operating Results of Cosmetics, Fragrances & Toiletries Departments In Department Stores with Sales Over $1 Million, 1982
(Median Results)

	Total Upstairs Departments (103*)	Cosmetics, Fragrances & Toiletries (84*)
Net sales, % change from last year	+ 3.8	+ 11.3%
Sales, % of merchandise division**	--	73.7
Sales, % of total store sales	90.7	6.3
Cumulative markon, %	48.4	39.9
Gross margin, % of sales (incl. cash discounts)	41.9	39.3
Markdowns, % of sales (incl. employee discounts)	14.4	1.2
Salespeople's salaries, % of sales	7.8	8.2
$ sales per sq. ft. of selling space (Main or largest selling unit)	$109.0	$256.0
Number of stock turns (times)	2.7	2.9

* Number in parentheses represents the number of reporting firms in each category

** Cosmetics, fragrances and toiletries department is in the personal needs and small wares merchandise division.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1982 (1983 edition)

CONSUMER PRICES

Consumer prices for toilet goods and personal care appliances rose 5.2% in 1983, marking a slowing from the 7.0% increase registered in 1982. The most rapidly climbing segment in 1983 was the dental and shaving products group up 7.1% in the year. The slowest rise in consumer prices was recorded by the products for hair group, up 5.5%.

Overall consumer prices rose only 3.2% in 1983 after a rise of 6.1% in the previous year.

Consumer Price Index for Toiletries & Cosmetics, 1981 - 1983
(1967 = 100, unless otherwise stated)

	1983	1982	1981	Percent Change 1983/ 1982	Percent Change 1983/ 1981
All items	298.4	289.1	272.4	+ 3.2%	+ 9.5%
Personal care	261.1	248.3	232.0	+ 5.2	+ 12.5
Toilet goods & personal care appliances	260.6	246.1	227.2	+ 5.9	+ 14.7
Products for the hair, hair pieces & wigs*	151.5	143.5	132.7	+ 5.5	+ 14.1
Dental & shaving products*	161.8	151.1	137.8	+ 7.1	+ 17.4
Cosmetics, bath & nail preparations manicure & eye make-up implements*	147.2	138.8	128.0	+ 6.1	+ 15.0
Other toilet goods & small personal care appliances*	147.6	140.7	131.4	+ 4.9	+ 12.3

* = 12/77 = 100

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

Women's Cosmetics

In February 1983, Vogue magazine conducted a study among its subscribers covering the buying and usage of beauty and grooming products. Questionnaires were mailed to 5000 subscribers with the first 2,433 replies forming the base for the study.

The study found that lipstick and eye shadow were the most frequently used products, reportedly used by 96% and 95% of respondents, respectively. Usage was at its lowest within eyebrow make-up group with only 46% of respondents stating they ever used the products.

Percent of VOGUE Readers Using Specified Cosmetics & Their Frequency of Usage

		Frequency of Usage				
	Percent Using*	Daily	Few Times a Week	Less Often	No Answer	Avg. Price Paid
Face powder	64%	na	na	na	na	na
Loose face powder	45	55	14	19	12	$ 9.74
Pressed powder	32	50	18	20	12	7.78
Foundation make-up	84	na	na	na	na	na
Tinted liquid	67	69	12	14	5	11.18
Tinted cream	16	54	14	19	13	10.33
Bronzer	12	32	8	50	10	8.35
Make-up stick	13	61	15	15	9	5.18
Other forms of foundation, make-up	4	na	na	na	na	na
Blusher	93	na	na	na	na	na
Powder	76	69	11	7	13	8.23
Cream	35	56	14	13	17	6.92
Liquid	7	na	na	na	na	na
Stick	5	na	na	na	na	na
Crayon	1	na	na	na	na	na
Lipstick	96	na	na	na	na	na
Full coverage	83	68	13	5	14	6.55
Sheer	38	53	22	10	15	6.19
Lipgloss	58	na	na	na	na	na
Pot	32	31	24	28	17	5.70
Tube	22	38	23	19	20	4.94
Wand	18	28	24	27	21	5.59
Lip pencil	52	41	18	25	13	5.49
Eye Shadow	95	na	na	na	na	na
Powder	77	69	15	10	6	8.58
Crayon/pencil	52	66	16	12	6	5.90
Wand/applicator	32	59	14	18	9	7.48
Cream	14	37	19	26	18	8.35
Liquid	9	36	16	30	18	8.57

(continued)

CONSUMER BUYING HABITS

Women's Cosmetics

Percent of VOGUE Readers Using Specified Cosmetics & Their Frequency of Usage
(continued)

	Percent Using*	Frequency of Usage				Avg. Price Paid
		Daily	Few Times a Week	Less Often	No Answer	
Eyeliner	60%	68	12	13	7	$ 5.92
Mascara	91	na	na	na	na	na
Automatic wand	53	70	10	8	12	6.42
Lash lengthener, thickener	46	75	9	6	10	6.13
Comb-on	8	na	na	na	na	na
Cake	3	na	na	na	na	na
Other types of mascara	3	na	na	na	na	na
Eyebrow Make-up	46	na	na	na	na	na
Wood pencil	27	67	7	15	11	4.68
Brush-on brows	15	67	6	13	14	5.75
Automatic pencil	10	57	8	15	20	4.83

* Base: Users of each product category.
na = not available

Influences Towards Trying a New Make-Up Product

	Foundation Make-up	Face Powder	Blusher	Lipstick/ Lipgloss	Eye Make-up Products
Magazines	33%	31%	34%	40%	58%
Television	9	5	6	9	16
Product samples	34	24	32	34	45
Store promotions	25	21	27	28	38
Salesperson	43	39	40	36	36
Friends/relatives	29	24	25	27	28
Other	13	15	12	15	--

Note: Totals add to more than 100.0% due to multiple responses. Base is number of respondents using the product.

Source: Vogue Magazine
Beauty/Health Study 1983

CONSUMER BUYING HABITS

Skin Care Products

Better than half of all Vogue subscribers used skin care products with age retarding ingredients according to the February 1983 survey. Of these users, 82% applied the product daily while another 13% used them a few times a week.

The most commonly used skin care product among subscribers was moisturizers used by 85% of respondents. The vast majority of the users (79%) reported that they used the moisturizer daily.

The most effective way to get people to try skin care products appears to be through product samples, with 56% of respondents reporting this to be a major influence.

Percent of VOGUE Readers Using Specified Skin Care Products & Their Frequency of Usage

	Percent Using*	Daily	A Few Times A Week	Less Often	No Answer	Avg. Price Paid
Cleansing cream	39%	69%	13%	8%	10%	$ 9.19
Cleansing lotion	25	56	16	14	14	10.46
Cleansing grains	16	9	23	58	10	7.95
Facial soap	57	81	6	6	7	5.90
Astringent	36	53	19	16	12	8.49
Freshener	24	60	12	16	12	10.16
Toner	25	52	16	16	16	10.91
Moisturizer lotion, cream	85	79	7	3	11	14.68
Eye cream	43	63	12	12	13	13.16
Facial mask	38	6	21	65	8	10.33
Night cream	44	69	12	9	10	20.14
Skin care products with age retarding ingredients	52	82	13	3	2	na

* Base: Users of each product category.
na = not available.

Skin Care Purchases by Price Point

	Under $5	$5-$8	$8-$11	$11-$20	$20 & Over	No Answer
Cleansing cream	15%	16%	15%	12%	6%	36%
Cleansing lotion	8	15	15	20	7	35
Cleansing grains	13	15	22	11	--	39
Astringents	17	13	17	16	2	35
Fresheners	6	16	20	18	3	37
Toners	7	12	18	20	6	37
Moisturizer lotion/cream	9	10	14	20	18	29
Eye cream	6	12	15	21	13	33
Facial mask	12	14	20	16	7	51

CONSUMER BUYING HABITS

Skin Care Products

Facial Soap Price Paid	Percent	Night Cream Price Paid	Percent
Under $2.00	13%	Under $5.00	18%
$2.00 - $3.00	12	$10.00 - $15.00	12
3.00 - 5.00	13	15.00 - 20.00	8
5.00 - 7.00	5	20.00 - 30.00	12
7.00 - 9.00	11	30.00 - 40.00	12
9.00 & over	20	40.00 & over	6
No answer	26	No answer	32

Source: Vogue Beauty Survey July 1983

Major Influences for Trying Skin Care Products

Influences	Respondents
Product samples	56%
Magazines	51
Store promotions	36
Salesperson	36
Friends/relatives	34
Television	16

Note: Totals add to more than 100.0% due to multiple responses.

In March 1983, Seventeen magazine conducted a study among members of its consumer panel on their usage of skin care products. The panel is nationally representative of all girls in the U.S. aged 13-19.

The first 1,125 returns formed the basis for the results of the survey. Most often, drug stores were the most frequent place of purchase for skin care items among respondents as noted below.

Place of Purchase of Skin Care Products
(Base = Girls using product)

	Drug-store	Super-Market/ Grocery	Discount Store	Dept. Store	Door-To-Door Agent	Other	No Answer
Moisturizer lotion	36.5%	19.0%	9.3%	23.5%	9.5%	10.7%	0.2%
Moisturizer cream	38.0	15.3	6.5	17.8	15.0	13.7	0.6
Hand lotion	31.4	41.7	11.0	6.6	4.7	6.9	2.7
Hand cream	29.5	36.3	6.5	7.2	10.8	7.9	6.6
Dry skin lotion	40.7	25.3	6.7	8.5	3.5	6.2	11.7

(continued)

CONSUMER BUYING HABITS

Skin Care Products

Place of Purchase of Skin Care Products
(Base = Girls using product)
(continued)

	Drug-store	Super-market/ Grocery	Discount Store	Dept. Store	Door-To-Door Agent	Other	No Answer
Dry skin cream	47.6%	25.6%	4.4%	7.8%	5.6%	5.0%	7.2%
Astringent	50.6	18.9	9.7	10.9	3.7	6.1	4.3
Facial mask	34.6	6.1	3.3	7.3	31.8	18.7	1.8
Medicated skin cream	59.8	13.7	7.7	4.2	0.9	5.1	11.1
Medicated liquid/lotion	58.7	10.9	4.8	8.0	1.5	6.6	12.0
Freshener/toner/conditioner	47.6	6.3	3.7	14.2	13.7	10.6	7.9
Medicated pads	39.9	29.5	8.1	6.4	1.2	8.1	9.8
Eye/night cream	59.7	7.1	4.5	12.7	9.3	9.0	3.0
Bath soap	14.1	69.2	6.3	4.1	1.4	3.4	4.5
Complexion soap	48.6	35.6	2.1	6.9	2.1	2.6	5.7
Medicated soap	56.5	27.4	3.4	6.8	1.9	4.0	4.1
Cleansing cream	54.7	9.7	5.4	6.1	9.2	8.8	9.7
Cleansing liquid/lotion	62.2	9.9	5.0	7.2	3.6	8.3	8.0
Cleansing grains	60.5	13.9	6.4	6.7	4.5	6.7	4.0
Medicated cleansing grains	56.8	25.8	4.4	3.4	3.7	4.2	4.2

Source: Seventeen Magazine
Skin Care Survey 1983

Women's Fragrances

Another survey conducted by Seventeen covered girls' usage of fragrances. This survey, conducted in June 1983, found that 99.5% of the girls, aged 13-19, surveyed do use a fragrance of some kind. 88.1% of respondents stated they used perfume while 82.6% stated they used cologne/toilet water.

Seventeen reports that a "significant" number of adult women will continue to use the fragrance they first select as a teenager.

Acquisition Patterns of Girls Using Fragrances

How fragrance was acquired	Perfume	Cologne/Toilet Water
Buy for self	74.3%	79.7%
Receive as a gift	88.8	88.5

Note: 64.5% of girls who use perfume both buy it for themselves and receive it as a gift; 68.8% of girls who use cologne/toilet water both buy it for themselves and receive it as a gift.

CONSUMER BUYING HABITS

Women's Fragrances

Last Purchase of Fragrances by Teenage Girls

When last bought fragrance	Perfume	Cologne/Toilet Water
Within past month	26.8%	21.8%
2-3 months ago	32.8	32.2
4-6 months ago	18.8	20.2
7-12 months ago	11.9	12.5
More than a year ago	9.7	13.3

Place of Purchase of Fragrances by Teenage Girls

Place of Purchase	Perfume	Cologne/Toilet Water
Department store	48.5%	38.5%
Drug store	26.7	31.6
Home agent (door-to-door)	8.6	10.4
Boutique/specialty store	7.7	6.4
Discount store	4.6	7.5
Variety store	1.6	3.1
Mail order	1.2	1.5
Other	1.4	1.3

Note: Totals add to more than 100.0% due to multiple mentions.

A long lasting scent was judged important in the selection of a fragrance by 82.0% of the survey respondents. Price was ranked second in importance. More than half of teenage girls felt that packaging was not important in their purchase decision.

Degree of Importance of Selected Factors in the Purchase of a Fragrance

	Important	Neutral	Not Important	No Answer
Long-lasting scent	82.0%	13.8%	2.8%	1.4%
Price	40.8	41.8	16.2	1.2
Friend's recommendation	29.2	55.3	14.5	1.0
Name of fragrance	21.1	36.7	39.7	2.5
Maker of fragrance	19.6	41.1	37.3	2.0
Salesperson's recommendation	13.5	42.7	41.4	2.4
Packaging	9.9	35.9	51.6	2.6

Source: Seventeen Magazine
Fragrance Survey, 1983

CONSUMER BUYING HABITS

Among Vogue subscribers who reported that they used more than one fragrance, the median number of scents used was three. Nearly one-third of respondents reported that they use three different scents.

Vogue subscribers reported that the median price paid for perfume was $35.90 while the median price for Cologne or Eau de Toilette was $21.50.

Number of Scents Used By Women Who Change Scents

	Percent
Two	23%
Three	32
Four	17
Five	10
Six - nine	9
Ten or more	5
No answer	4
Median number	3.8
Mean number	4.2

Average Price Paid for Fragrances

Perfumes		Cologne or Eau de Toilette	
Price Paid	Percent	Price Paid	Percent
Under $20.00	18%	Under $10.00	9%
$20.00 - $29.99	22	$10.00 - $14.99	15
30.00 - 39.99	17	15.00 - 19.99	21
40.00 - 49.99	14	20.00 - 24.99	18
50.00 - 59.99	11	25.00 - 29.99	17
60.00 & over	18	30.00 & over	20
Median price	$35.90	Median price	$21.50
Mean price	42.20	Mean price	23.34

Women's Hair Care Products

The median price paid for shampoo among respondents to the Vogue subscriber survey was $3.94 while the median price for hair conditioner was $4.27.

CONSUMER BUYING HABITS

Women's Hair Care Products

Usage of Hair Care Products At Home

	Daily	A Few Times A Week	A Few Times A Month	Less Often	No Answer
Instant conditioner	23%	40%	22%	11%	4%
Creme rinse	27	42	15	13	3
Moisturizing conditioner	11	31	32	20	6
Other hair conditioner	9	26	30	29	6
Hair setting gel	15	33	20	16	16
Texturizer	13	21	37	19	10

Hair Care Purchases By Price Point

	Shampoo	Hair Conditioner	Creme Rinse/ Texturizer	Setting Lotion/Gel	Hair Coloring
Under $2.00	4%	4%	3%	5%	10%
$2.00 - $3.00	20	18	21	22	
$3.00 - $4.00	27	24	26	19	26
$4.00 - $5.00	11	16	15	18	31
$5.00 - $6.00	11	11	9	12	18
$6.00 - $10.00	17	19	19	22	11
$10.00 & over	10	8	7	2	4
Median price	$ 3.94	$ 4.27	$ 4.00	$ 4.26	$ 4.49
Mean price	5.05	5.35	5.05	4.76	4.99

Source: Vogue Beauty/Health Study

Major Influences For Trying Hair Care Products

	Percent
Friends/relatives	52%
Magazines	48
Product samples	42
Television	25
Salesperson	22
Store promotions	17

Note: Totals add to more than 100.0% due to multiple answers.

CONSUMER BUYING HABITS

Men's Toiletries

The gift market dominates retailing of most lines of men's toiletries and women account for the great bulk of purchases except for the more utilitarian products, such as shaving needs. It is estimated that female shoppers account for as much as 75% of men's fragrance sales; however, men are beginning to take a more active part in selecting fragrance items for themselves.

In a 1983 survey for Chain Store Age/General Merchandising Edition (March 1983) by Leo Shapiro & Associates it was found that half of the men interested in buying cologne last year expected to buy it themselves. There appeared to be growing interest in this product category among blue-collar workers as well as white-collar workers and professionals.

Almost two-thirds of those polled for CSA indicated they would look for an advertised brand, with 36.9% seeking a specific brand. Department stores are the preferred outlet type for men's fragrances, followed by drug stores, then by discounters.

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00) (1983 Edition available now -- 1984 Edition will be available in July, 1984)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics. (May)

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included. (May)

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, $15.00) (July)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label. (September)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

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HOSIERY & LEGWEAR
(Men's, Women's & Children's)

Market Trends

The hosiery industry, which had enjoyed considerable stimulus in the market place from consumer interest in novelties, fashion and color in hosiery, was hit quite hard by the recession in 1982. However, 1983 brought considerable improvement in demand and this is continuing in 1984.

Overall shipments measured in pairs were up about 7% in 1983 compared with 1982. Not all segments shared in the gain, however. Infants' and children's hosiery continued to slide from a 1981 peak in shipments; foot socks, too, were generally weak. However, shipments of anklets registered a very strong gain (up 31%) in 1983 compared with 1982, and women's pantyhose gained over 7%.

A reviving economy plus industry promotions of a broader selection of styles, textures, colors and the use of designer names and other eye-catching advertising themes have helped lift consumer spending from the 1982 doldrums. The holiday and resort selling seasons, 1983-1984, were reported in the trade press to be very strong. The growing importance of increasingly sophisticated consumers interested in, and able to afford, a legwear wardrobe, with a variety of styles and colors, augers well for the balance of this year.

Legwarmers, which had done well in 1982 counter to the general trend in hosiery, were reported to be off in demand in the better stores, but doing better in discount houses and mass merchandisers.

Manufacturers of upscale athletic socks have stepped up marketing and merchandising efforts behind branded lines to be sold through department stores, as this market is seen as having good growth potential. In the first six months of 1983, according to a study by Market Research Corp. of America (MRCA), overall sales of athletic socks were up almost 20% in terms of pairs, over 45% in dollars. Specialty and athletic footwear stores specializing in high performance, more expensive athletic hosiery and department stores with upscale lines shared in this gain.

In women's hosiery, most firms are now offering their largest and most diversified collections ever, and are also offering new incentive programs for retailers. Private labels are getting increased attention from retailers in bodywear, while many are narrowing their selections of designer names.

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Based on estimates resulting from the 1981 Annual Survey of Manufactures (reported in 1983), the value of all products shipped by the hosiery industry plus other receipts (called "industry shipments") rose 7.8% compared with 1980.

GENERAL INDUSTRY STATISTICS

Hosiery, Total (SIC 2251 & SIC 2252*)

	1981	1980	1977	% Change 1981/1977
Number of companies	na	na	528**	--
Number of mills/business locations	522	540	615	- 15.1%
Number with 20 or more employees	368	373	376	- 2.1
Employees, total (thous.)	60.5	62.4	58.8	+ 2.9
Production workers (thous.)	52.4	54.4	52.8	- 0.7
Payroll (mil. $)	$ 593.1	$ 568.2	$ 410.0	+ 44.6
Value added by manufacture# (mil. $)	1,246.3	1,149.7	858.5	+ 45.2
Value of industry shipments## (mil. $)	2,598.9	2,411.5	1,792.5	+ 45.0
Capital expenditures, new (mil. $)	55.3	49.9	31.4	+ 76.1

Women's Hosiery, Including Tights (Except Socks) (SIC 2251*)

	1981	1980	1977	% Change 1981/1977
Number of companies	na	na	176	--
Number of mills/business locations	160	172	200	- 20.0%
Number with 20 or more employees	117	123	119	- 1.7
Employees, total (thous.)	29.6	30.1	26.6	+ 11.3
Production workers (thous.)	25.4	26.3	23.8	+ 6.7
Payroll (mil. $)	$ 289.5	$ 277.8	$ 191.3	+ 51.3
Value added by manufacture# (mil. $)	708.9	654.6	457.0	+ 55.1
Value of industry shipments## (mil. $)	1,304.5	1,218.6	871.2	+ 49.7
Capital expenditures, new (mil. $)	22.6	27.8	16.6	+ 36.1

Hosiery, nec (SIC 2252*)

	1981	1980	1977	% Change 1981/1977
Number of companies	na	na	382	--
Number of mills/business locations	362	368	415	- 12.8%
Number with 20 or more employees	251	250	257	- 2.3
Employees, total (thous.)	30.9	32.3	32.2	- 4.0
Production workers (thous.)	27.0	28.1	29.0	- 6.9
Payroll (mil. $)	$ 303.6	$ 290.4	$ 218.7	+ 38.8
Value added by manufacture# (mil. $)	537.4	495.1	401.5	+ 33.8
Value of industry shipments## (mil. $)	1,294.4	1,192.9	921.3	+ 40.5
Capital expenditures, new (mil. $)	32.7	22.1	14.8	+120.9

na - not available
nec - not elsewhere classified

(footnotes continued)

(footnotes from previous table continued)

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC) determined by the principal product made. The hosiery classifications comprise all mills primarily engaged in knitting, dyeing or finishing hosiery. SIC 2251 covers mills making women's full-length and knee-length seamless and full-fashioned hosiery, pantyhose and tights.

SIC 2252 covers mills engaged in knitting, dyeing or finishing infants' and children's hosiery, men's and boys' hosiery, socks, slipper socks and all other types of hosiery not included in SIC 2251.

**Represents the 1977 enterprise industry category. (See 1977 Enterprise Statistics, U.S. Bureau of the Census ES 77-1).

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by other manufacturers, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes receipts for contract work and miscellaneous receipts as well as the value of shipments of both primary products and secondary products made by manufacturers in these industries. The value of primary product shipments (hosiery), alone--plus the value of shipments of hosiery by mills classified in other industries who make hosiery as secondary products--is covered in product shipments on pages 11 & 12.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures; Annual Survey of Manufactures, 1980, 1981. (Data on number of mills, 1980, 1981, are from County Business Patterns.)

The National Association of Hosiery Manufacturers, Charlotte, N.C., compiles statistical information on the hosiery industry based on reports received regularly from knitting mills producing a majority of all the types of hosiery made in the United States. These reports reflect the trends which are the important guides to the hosiery industry and its market.

Added to the amounts actually reported are estimates representing the balance of the industry's activity, to arrive at industry-wide data. The NAHM figures do not include non-knitting companies, such as commercial dyers and finishers, converters, etc.

GENERAL INDUSTRY STATISTICS

Number of Hosiery Companies, 1980-1983
(As of End of Year)

Year	Total	Women's* Total	Women's* North***	Women's* South	All Other** Total	All Other** North***	All Other** South
1983	292	92	22	70	207	13	194
1982	295	92	22	70	210	13	197
1981	302	93	23	70	216	14	202
1980	322	103	29	74	226	16	210

Number of Hosiery Mills (Plants), 1980-1983
(As of End of Year)

Year	Total	Women's* Total	Women's* North***	Women's* South	All Other** Total	All Other** North***	All Other** South
1983	415	146	25	121	269	22	247
1982	417	146	25	121	271	22	249
1981	427	147	26	121	280	23	257
1980	445	156	31	125	289	25	264

* Covers hosiery, pantyhose, socks, etc., knit on 300 needles or more for women and girls, size 7 and up. (Some companies are included in both columns * and **).

** Covers hosiery knit on less than 300 needles for infants and children (size 3-8½), for girls, boys and women (size 8-11); for men (size 10 and up).

*** North includes the midwest and far west.

Source: National Association of Hosiery Manufacturers,
1983 Hosiery Statistics (50th Annual Report)

Employment & Earnings

Employment in the women's hosiery industry gained in 1983, rising 6.0% over the 1982 total and 5.3% over the 1981 total. The 1983 employment average of 33,500 in women's hosiery industry, however, was well below the peak of 35,500 reported in 1974.

In other types of hosiery, mainly men's hosiery, 1983 employment averaged 32,100 workers, which was 1.6% above 1982 but still below the 1981 total of 33,000. In this segment of the hosiery industry, a peak average employment level of 34,500 was reported in 1977. The 1983 level was about 7% below this peak.

The Bureau of Labor Statistics and the Census Bureau each use a different methodology in computing employment data and their figures do not agree exactly.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Hosiery Industry, 1981-1983
(Annual Averages)

	Women's Hosiery, Except Socks (SIC 2251*)			Hosiery, nec (SIC 2252*)		
	1983	1982	1981	1983	1982	1981
All employees (thous.)	33.5	31.6	31.8	32.1	31.6	33.0
Production workers (thous.)	30.0	28.3	28.5	28.9	28.6	30.0
Av. weekly earnings	$220.4	$191.57	$181.91	$207.04	$184.93	$181.98
Av. weekly hours	40.0	36.7	37.2	38.2	35.7	37.6

nec - not elsewhere classified
* See page 3 for definition of the Standard Industrial Classification (SIC) codes.

Source: U.S. Bureau of Labor Statistics

Number of Employees in the Hosiery Industry, 1980-1983
(Annual Averages)

Year	Total	Women's Hosiery	Hosiery, nec
1983	65,600	33,500	32,100
1982	63,200	31,600	31,600
1981	64,800	31,800	33,000
1980	63,800	31,000	32,800

nec - not elsewhere classified

Source: U.S. Bureau of Labor Statistics

LOCATION OF THE INDUSTRY

About nine out of 10 mills operating in the hosiery industry are located in the South, and this region accounted for over 93% of total hosiery production in 1983.

North Carolina is the dominant State in the industry. According to the National Association of Hosiery Manufacturers, North Carolina accounts for well over half of total hosiery production, and is particularly important in the output of sheer hosiery for women, accounting for about 59% of total 1983 production in this classification.

LOCATION OF THE INDUSTRY

Percent of Hosiery Production by Geographical Areas & Leading States, 1980, 1983

	Total, All Types		Women's Pantyhose		Other Sheer Hosiery (Women's)		Socks & Anklets	
	1983	1980	1983	1980	1983	1980	1983	1980
Total production	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
North, total	6.7	6.5	7.1	6.9	7.5	6.4	6.4	6.3
Pennsylvania	6.7	6.5	7.1	6.9	7.5	6.4	6.4	6.3
New England states, N.Y., N.J., Dela.	0.1	0.2	0.1	0.1	0.1	0.1	0.4	0.2
Midwestern & Western states	4.6	3.8	6.9	6.3	7.3	5.7	1.5	1.6
South	93.3	93.5	92.9	93.1	92.5	93.9	93.6	93.7
North Carolina	54.8	58.5	49.4	47.1	58.8	59.4	57.5	66.0
Tennessee	14.5	15.3	15.0	15.3	12.9	16.3	15.3	14.2
Georgia	4.5	3.1	0.3	0.5	0.8	1.0	10.2	6.3
Other Southern states*	19.5	16.6	28.2	30.2	20.0	17.2	10.6	7.2

*Includes Ala., Ark., Fla., Ky., Md., Miss., S.C., Tex., Va., West Va., and Puerto Rico.

Source: National Association of Hosiery Manufacturers, Inc.

OPERATING RATIOS

A series of annual line of business reports has been compiled by the Federal Trade Commission--the latest, covering the year 1976, was issued in May 1982.

The hosiery industry in the U.S. lagged far behind other manufacturing industries in operating income to sales ratio. It ranked 195th on that score with a ratio of 4.9%. The weighted average percent of operating income to sales for all manufacturing companies was 7.7%.

A revealing measure of industry performance is the ratio of promotion expenses to sales. This measurement includes all types of selling expense, including media advertising expenses, which are also separately reported in terms of percent to sales by the FTC. The hosiery industry ranks among the top 10 manufacturing industries in these ratios--ranking 5th in its ratio of selling expense to sales, 6th in its ratio of media advertising expense to sales.

Selected Operating Ratios For The Hosiery Industry Compared With All-Manufacturing Industry Averages, 1976

	Weighted Average All Mfg. Industries	Hosiery Industry
Operating income, % to assets	12.3	9.7
Operating income, % to sales	7.7	4.9
Total selling expense to sales, %	6.6	25.6
Media advtg. expense to sales, %	1.2	10.9
R & D expense, % to sales	1.9	0.1

Source: Bureau of Economics, Federal Trade Commission, Annual Line of Business Report, 1976 (May 1982)

NATIONAL ADVERTISING

An analysis of total spending for space and time in major media by the hosiery industry showed a total of over $65 million spent for advertising in the six major media.

Expenditures for Space/Time In Major Media By Hosiery Manufacturers, 1980

	Thous. of $
6-Media total	$ 65,131.1
Consumer magazines	13,196.8
Newspaper supplements	522.8
Network television	46,440.0
Spot television	4,170.8
Network radio	767.7
Outdoor	33.0

Source: Leading National Advertisers

In 1980, L'eggs topped the list of hosiery brands advertised in major media, with a total of $16.5 million, spent primarily for network television time. Hanes, producer of L'eggs hosiery spent an estimated $40 million for advertising and promotion in 1982. Their advertising budget for advertising alone in 1983 was reported to be in excess of $16 million.

Ad competitive pressure mounts to build a strong brand image, makers are increasingly stepping up promotions using designer names, names of athletic stars and other celebrity endorsements where pertinent. Meanwhile, many large retailers are establishing their own private label hosiery items, and many have been very successful in this area. In New York City, Bloomingdale's is reported to have 70% of its hosiery department in private label, Saks Fifth Avenue, New York, 50%. (WWD, Nov. 18, 1983)

PRODUCTION

The National Association of Hosiery Manufacturers, Inc., Charlotte, N.C., compiles hosiery industry information based on reports from manufacturers and estimates covering non-reporting hosiery producers.

Production of hosiery by U.S. mills reached a peak of 310.1 million dozen pairs in 1981, then as the recession got underway declined to 281.8 million dozen pairs in 1982. Production rebounded in 1983, reaching 309.4 million dozen pairs. Most segments of the industry shared in the gains last year, particularly products with a strong fashion statement such as casual hosiery and upscale pantyhose. Production of tights for women rose almost 49% compared with the 1982 total, according to the NAHM.

Production of Hosiery, 1980-1983
(Dozens of pairs in thousands)

	1983	1982	1981	1980	% Change 1983/82
Hosiery, total	309,420	281,768	310,060	280,237	+ 9.8%
Infants' & children's, sizes 3-8½	27,041	25,764	31,195	28,807	+ 5.0
Footsocks	620	618	794	720	+ 0.3
Anklets	16,522	16,055	20,494	19,620	+ 2.9
Mid-calf/crew	1,396	1,446	1,221	1,264	- 3.5
Knee-highs	6,993	6,653	7,686	6,620	+ 5.1
Waist-highs	1,471	992	1,000	943	+ 48.2
Stockings	39	*	0	0	--
Girls', boys', women's, sizes 8-11 (knit on less than 300 needles), total	54,223	46,324	58,780	48,764	+ 17.0
Footsocks	5,830	6,503	9,427	8,544	- 10.3
Cushion	5,424	6,121	8,657	7,444	- 11.4
Non-cushion	406	382	770	1,100	+ 6.3
Anklets	17,285	11,875	14,538	12,533	+ 45.6
Cushion	7,178	4,321	5,771	4,277	+ 66.1
Non-cushion	10,107	7,554	8,767	8,256	+ 33.8
Mid-calf/crew	4,858	3,984	4,509	3,046	+ 21.9
Cushion	3,732	2,982	3,398	2,402	+ 25.1
Non-cushion	1,126	1,002	1,111	644	+ 12.4
Knee-highs	25,654	23,403	29,823	24,325	+ 9.6
Cushion	9,966	6,958	9,966	7,974	+ 43.2
Non-cushion	15,688	16,445	19,857	16,351	- 4.6
Stockings	48	79	7	3	- 39.2
Waist-highs (tights) size 7 & up	548	480	476	313	+ 14.2
Women's & girls' hosiery (footsocks, pantyhose, stockings, tights, etc.) (knit on 300 needles or more) total	161,677	147,678	151,684	139,603	+ 9.5
Pantyhose	116,560	105,076	104,460	96,015	+ 10.9
Sheer	64,048	58,491	59,598	57,301	+ 9.5
Opaque	3,463	2,399	1,666	1,133	+ 44.3
Elastomer	47,622	43,226	42,505	36,704	+ 10.2
Other (tights, size 7 & up)	1,427	960	691	877	+ 48.6
Stockings	4,854	4,477	4,601	5,153	+ 8.4
Non-stretch	1,514	1,463	1,811	1,999	+ 3.5
Stretch	2,712	2,434	2,060	2,375	+ 11.4
Support	570	540	633	678	+ 5.5
Other	58	40	97	101	+ 45.0
Other women's hosiery	40,263	38,125	42,623	38,435	+ 5.6
Footsocks	369	372	433	224	+ 0.8
Anklets	791	756	1,126	1,147	+ 4.6
Knee-highs	39,067	39,979	41,064	37,064	+ 5.6
Mid-calf/crew	36	--	--	--	+100.0

(continued)

PRODUCTION

Production of Hosiery, 1980-1983
(Dozens of pairs in thousands)
(continued)

	1983	1982	1981	1980	% Change 1983/82
Men's hosiery (size 10 & up) (knit on less than 300 needles), total	66,479	62,002	68,401	63,063	+ 7.2%
Cushion	33,359	31,562	36,216	30,786	+ 5.7
Non-cushion	33,120	30,440	32,185	32,277	+ 8.8
Footsocks	471	352	517	292	+ 33.8
Cushion	262	144	179	164	+ 81.9
Non-cushion	209	208	338	128	+ 0.5
Anklets	26,721	26,723	27,285	27,624	--
Cushion	5,008	5,882	6,471	6,225	- 14.8
Non-cushion	21,713	20,841	20,814	21,399	+ 4.2
Mid-calf/crew	17,746	17,274	19,945	17,375	+ 2.7
Cushion	10,232	11,132	12,741	10,218	- 8.1
Non-cushion	7,514	6,142	7,204	7,157	+ 22.3
Knee-highs	21,541	17,653	20,654	17,772	+ 22.0
Cushion	17,857	14,404	16,825	14,179	+ 24.0
Non-cushion	3,684	3,249	3,829	3,593	+ 13.4

Source: National Association of Hosiery Manufacturers, Hosiery Statistics.

Control-top pantyhose for women accounted for 18.5% of 1983 total pantyhose production, 19.1% in 1982. Production was up 7.7% to reach 21,580 thousand dozen pairs in 1983.

CONSUMPTION OF FIBERS

Man-made fibers represent the bulk of all fibers consumed in the production of hosiery, although cotton makes up a significant portion of fibers used in specialized hosiery types.

Within the man-made fiber group, acrylic fibers are the major component except in women's and girls' hosiery/pantyhose, etc., knit on 300 needles or more. Practically all of these are made of nylon.

CONSUMPTION OF FIBERS

Fiber Content of Hosiery Produced in the Jan.-April 1983 Period

	Total	Infants'/ Children's (Sizes 3-8½)	Girls'/Boys'/Women (Sizes 8-11)		Women's/ Girls' Hosiery (300 Needles+)	Men's Hosiery (Sizes 10 & Up)	
			Cushion	Non-cushion		Cushion	Non-cushion
Total production	100%	100%	100%	100%	100%	100%	100%
Natural fibers	11	25	43	20	*	29	14
Cotton	11	25	43	19	*	28	8
Wool	*	nr	*	1	nr	1	6
Man-made fibers	89	75	57	80	100	71	86
Acrylic	22	41	54	48	*	70	69
Nylon	66	34	2	32	100	1	16
Polyester	*	*	1	*	*	nr	nr
Other	*	*	*	nr	*	*	*

nr - not reported
* Less than 1%.

Source: National Association of Hosiery Manufacturers, Inc.
Hosiery Statistics

Information on fiber consumption by end-product is also compiled by the Textile Economics Bureau. According to this source, total fiber consumption in sheer hosiery in 1982 was off 1.9% in 1982 compared with 1981, reaching 71.6 million pounds; in anklets and socks, consumption dropped 9.2%, to reach 173.2 million pounds.

It is reported that natural fibers are taking on increased importance in the hosiery market as manufacturers introduce more fashion into their lines. All-cotton, all-wool and predominantly natural fiber blends account for about 32% of men's hosiery purchases, according to 1982 Market Research Corp. of America (MRCA) data.

Orlon acrylics, Orlon acrylic blends and other acrylics are reported to represent about 49% of men's hosiery. Designer hosiery collections have been a big factor in pushing the industry toward more natural fibers, as well as toward more colors.

High-bulk Orlon dominates in athletic socks, but some trend toward greater use of cotton and wool has been reported. Consumers have become increasingly informed and selective in making purchases of athletic socks. Makers are greatly expanding use of informative hangtags on fiber content as well as on construction and information to build a strong brand image.

CONSUMPTION OF FIBERS

Textile Fibers Consumed in U.S. Production of Hosiery, 1980-1982
(millions of pounds)

	1982	1981	1980	% Change 1982/1981
Sheer hosiery, total reported*	71.6	73.0	70.7	- 1.9%
Man-made, total	68.5	69.9	67.8	- 2.0
Anklets & socks, total**	173.2	190.8	186.4	- 9.2
Man-made, total	139.9	149.1	151.9	- 6.2
Cotton	30.8	38.9	32.1	- 20.8
Wool	2.5	2.8	2.4	- 10.7

* Includes women's full-fashioned and seamless full-length hosiery, pantyhose, knee-highs and surgical hosiery.

** Includes men's & women's foot socks, anklets and nonsheer knee-high hose. Also includes men's mid-calf and surgical hose.

Source: Textile Economics Bureau,
Textile Organon, October 1983

SHIPMENTS

In interim years between the complete censuses of manufactures which are compiled every five years, the U.S. Bureau of the Census issues estimates on the value of shipments by major product types based on a sample survey of manufacturers. The next detailed census report will cover the year 1982 and preliminary data will be released on the hosiery industry in 1984.

According to the 1981 annual survey of manufactures, the value of hosiery shipped by U.S. mills reached $2.4 billion. This represented a gain of 6% in current dollars compared with the 1980 total. The sharpest gain (about 21%) was chalked up in shipments in the anklets/socks-for-women/boys/girls classification.

Summary of Value of Shipments of Hosiery by All Producers, 1978-1981
(millions of dollars)

	1981	1980	1979	1978	% Change 1981/1980
Hosiery, total	$2,432.5	$2,295.4	$2,090.3	$1,888.0	+ 6.0%
Women's except socks (SIC 2251*)	1,132.5	1,105.9	1,044.9	889.8	+ 2.4
Finished seamless hosiery, pantyhose	1,017.7	982.2	930.1	774.4	+ 3.6
Seamless full-length, knee-length & pantyhose shipped in greige	79.9	82.2	79.2	68.1	- 2.8
Full-fashioned hosiery, finished	8.5	nr	nr	nr	--
Full-fashioned hosiery, shipped in greige	1.8	1.6	nr	nr	+ 12.5
Hosiery exc. socks, type not specified	24.6	33.3	20.5	nr	- 26.1

(continued)

SHIPMENTS

Summary of Value of Shipments of Hosiery by All Producers, 1978-1981
(millions of dollars)
(continued)

	1981	1980	1979	1978	% Change 1981/1980
Hosiery, nec (SIC 2252*)	$1,300.0	$1,189.5	$1,045.4	$ 998.2	+ 9.3%
Men's finished seamless hosiery	705.9	681.9	627.6	525.9	+ 3.5
Other finished seamless hosiery (anklets, knee socks for women, boys, girls; children's hosiery, etc.)	429.5	355.2	318.3	299.2	+ 20.9
Seamless shipped in greige, nec	118.3	113.7	70.2	114.4	+ 4.0
Hosiery, nec, nsk	46.3	38.7	29.4	--	+ 19.6

nec - not elsewhere classified
nsk - not specified by kind
nr - not reported
* For definitions of SIC codes, see page 3

Source: U.S. Bureau of the Census,
Annual Surveys of Manufactures

Distribution

Limited information on the distribution of manufacturers' shipments of hosiery, based on a class of customer survey, was included in reports from the most recently issued Census of Manufactures. Of the reported total of women's hosiery shipments, 46% was shipped direct to retailers; of the total in other types of hosiery, 51% went direct to retailers in 1977.

Reported Distribution of Hosiery Shipments by Class of Customer, 1977

	Women's Hosiery, Except Socks (SIC 2251*)		Hosiery, nec (SIC 2252*)	
Total value of shipments (mil. $)	$ 819.1	%	$ 893.6	%
As reported in class of customer survey (mil. $)	595.4	100	701.2	100
Shipments to customers				
To wholesalers	59.3	10	132.4	19
Shipments--				
To retailers	272.8	46	361.0	51
To manufacturers	27.8	5	98.0	14
Other, including other establishments of same company	235.5	39	109.8	16

* For definitions of SIC codes, see page 3

Source: U.S. Bureau of the Census, 1977 Census of Manufactures,
Distribution of Sales by Class of Customer (MC77-SR-13).

SHIPMENTS

Industry Concentration

The hosiery industry--particularly the women's segment--is highly concentrated among large producers, according to findings in the 1977 census of manufactures. In that year, the top four companies controlled over half the value of U.S. shipments of women's hosiery. In men's seamless hosiery, the top 20 producers held a 59% share of the total shipments.

Share of Total Hosiery Shipments by All Producers Accounted For by The 4, 8, 20 & 50 Largest Companies, 1972, 1977

Specified types:		Total Value (mil.$)	% Accounted For by the Largest Companies Top 4	Top 8	Top 20	Top 50
Women's hosiery, except socks (SIC 2251)	1977	$819.1	50%	61%	77%	92%
	1972	899.5	34	47	67	85
Men's finished seamless hosiery (SIC 22522)	1977	464.6	24	36	59	82
	1972	285.9	27	40	61	85
All other finished seamless hosiery (SIC 22523)	1977	274.3	26	36	57	84
	1972	188.7	27	39	61	84
Seamless hosiery, exc. women's, shipped in the greige	1977	93.5	42	55	77	99
(SIC 22524)	1972	78.6	42	54	72	93

Source: U.S. Bureau of the Census, Census of Manufactures (MC77-SR-13).

The largest mills are in the women's hosiery component of the industry (SIC 2251) In 1981 mills with 250 or more employees represented only 21.4% of all the mills in the women's hosiery segment, but accounted for over 74% of total employment. Mills making men's and other types of hosiery (SIC 2252) are more numerous, but tend to have fewer employees.

Hosiery Manufacturers by Employment Size, 1981

	Women's Hosiery (SIC 2251*) No. of Mills	% of Mills	% of Employment	Hosiery nec (SIC 2252*) No. of Mills	% of Mills	% of Employment
Total establishments	160	100.0%	100.0%	36.2	100.0%	100.0%
Number by employment size:						
Under 10 employees	23	14.4	0.3	59	16.3	na
10 to 19 employees	20	12.5	0.9	52	14.4	2.5
20 to 49 employees	33	20.6	3.6	97	26.8	9.8
50 to 99 employees	24	15.0	5.8	55	15.2	12.5
100 to 249 employees	24	15.0	13.5	62	17.1	31.0
250 to 499 employees	17	10.6	18.7	33	9.1	34.5
500 employees or more	19	11.9	57.2	4	1.1	na

na - not available   nec - not elsewhere classified.
*For definitions of SIC codes, see page 3.

Source: U.S. Bureau of the Census, County Business Patterns 1981.

SHIPMENTS

Industry Concentration

At hosiery market time in March 1984 many hosiery manufacturers were anticipating a "shakedown", continuing the trend in the industry to a weeding out of the weaker hosiery firms. As in other areas of the U.S. apparel industry, firms have consolidated operations or merged to an increasing extent in the hosiery industry. In 1982 the domestic hosiery and sock division of Burlington Industries, which had a volume estimated at $132 million, was acquired by Kayser-Roth Corp., a division of Gulf & Western Industries.

Sales Concentration

Number of Companies in the Hosiery Industry & Their Sales
By Employment & Sales Size, 1977

	Companies		Industry Sales	
	Number	Percent	Mil. $	Percent
Total	528	100.0%	$1,609.9	100.0%
Paid employees:				
Under 50	350	66.3	148.7	9.2
50 - 249	135	25.6	382.7	23.8
250 & over	43	8.1	1,078.5	67.0
Sales size:				
Under $500,000	232	43.9	na	--
$500,000 - $999,999	98	18.6	70.2	4.4
$1 mil. - $4.9 mil.	144	27.3	333.3	20.7
$5 mil. - $9.9 mil.	30	5.7	217.2	13.5
$10 mil. - $24.9 mil.	15	2.8	237.5	14.7
$25 mil. & over	9	1.7	na	--

Sales Concentration Summaries

	Mills		Industry Sales	
	Number	Percent	Mil. $	Percent
Hosiery Industry, 1977				
Total	540	100.0%	$1,609.9	100.0%
4 largest companies	48	7.5	543.3	33.7
8 largest companies	65	10.1	664.3	41.3
20 largest companies	98	15.3	883.3	54.9
50 largest companies	150	23.4	1,131.7	70.3
Other companies	492	76.6	478.3	29.7

SHIPMENTS

Sales Concentration

		Share of Value of Industry Shipments 1972, 1977 % of Total By Largest Companies			
	Total Value (Mil. $)	4 Largest	8 Largest	20 Largest	50 Largest
Women's hosiery, exc. socks (SIC 2251*)					
1977 (176 companies)	$ 871.2	50%	62%	78%	94%
1972 (256 companies)	984.7	35	49	69	87
Hosiery, nec (SIC 2252*)					
1977 (382 companies)	921.3	20	30	46	66
1972 (375 companies)	600.6	19	29	46	66

nec - not elsewhere classified
* For definitions of SIC codes, see page 3.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Concentration Ratios in Manufacturing; 1977 Enterprise Statistics, General Report on Industrial Organization.

Detailed information on shipments of hosiery, in terms of pairs, is compiled by the National Association of Hosiery Manufacturers, Charlotte, N.C. Information is based on reports submitted to the association by knitting mills producing a majority of all types of hosiery made in the U.S., and these reports reflect overall industry trends. Data are adjusted by the association to include in totals estimates for nonreporting mills.

U.S. mill shipments of hosiery of all types in 1983 reached a record total of 308,079 thousand dozen pairs, gaining 9.8% over the 1982 total. Shipments in 1982 had fallen 4.8% below the 1981 level, reflecting the recession that prevailed in the U.S. and abroad.

Infants' & Children's Hosiery

In the smaller size categories, shipments in 1983 declined 1.4% compared with the previous year, reaching 24,483 thousand dozen pairs. This was 5,290 thousand dozens below the peak reached in 1979. Anklets are the largest category in infants'/children's hosiery, accounting for 61.3% of the 1983 total, down from the peak year 1979, when they accounted for 68.3% and over 22 million dozen pairs were shipped.

Girls', Boys', Women's Socks, etc.

Shipments of anklets, both cushion and non-cushion, were the fastest growing hosiery category. The total gained over 35% in 1983 compared with 1982, reaching 16,609 thousand dozen pairs. Within the size range 8 to 11, covering hosiery knit on less than 300 needles, knee-highs represented 47.2%, down from 49.5% in 1982.

SHIPMENTS

Women's Hosiery

Shipments of all types of women's and girls' hosiery knit on 300 needles or more in terms of pairs gained 7.1% in 1983 compared with 1982. Pantyhose shipments were up 8.8% and represented 71.8% of the total in this classification, up from a 70.7% share of the total in 1982 and 68.3% in 1981.

Shipments of sheer, conventional pantyhose were up 8.2% and accounted for 55.8% of the 1983 pantyhose total. In 1982 they represented 56%. Shipments of opaque pantyhose registered a sharp gain of 81% in 1983 compared with 1982, and they increased their share of the pantyhose total from 1.7% to 2.8%.

The elastomer pantyhose category continues to gain ground. Shipments were 5.8% in 1983 and they represented 40.3% of all pantyhose and 29% of all women's hosiery. This compares with a 26.8% share of the total in 1981.

Stockings continued the steady decline noted for the past 10 years. In this span shipments of women's hosiery have declined 67%, dropping from over 14 million pairs in 1974 to 4.6 million in 1983. Total women's hosiery shipments in the 10-year period, on the other hand, gained 78%; pantyhose, alone, went up over tenfold.

Men's Hosiery

Shipments of men's hosiery increased, but at a lower rate than noted for other categories. Anklets are the dominant type, but shipments were off 1.7% due to a drop in cushion types. Anklets accounted for 40.3% of the men's hosiery total in 1983, down from 43.6% in 1982. Knee-highs made a sharp gain in 1983 (up 19%) and increased in share of men's hosiery shipments from 28.1% in 1982 to 31.5% in 1983.

After dropping in popularity in 1982, shipments of mid/calf/crew socks for men recovered in 1983--with the gain concentrated in cushion types.

In the 10-year period 1974 to 1983, shipments of all types of men's hosiery in terms of pairs rose only 4.6%. A peak of over 74 million pairs was reached in 1978. The 1983 total was 10% below the record high, due to sharp declines in the demand for anklets. Shipments of this type in 1974 amounted to 53.8 million dozen pairs, falling to 26.9 million dozen pairs by 1983.

All Hosiery

Hosiery Shipments, 1980-1983
(Dozens of pairs in thousands)

	1983	1982	1981	1980	% Change 1983/1982
Hosiery total	308,079	288,704	304,826	286,379	+ 6.7%
Infants' & children's, sizes 3-8½	24,482	24,825	29,578	27,563	- 1.4
Footsocks	546	691	757	630	- 21.0
Anklets	15,002	15,207	19,807	18,206	- 1.3
Mid-calf/crew	1,474	1,559	1,085	1,211	- 5.5
Knee-highs	6,218	6,459	7,067	6,769	- 3.7
Waist-highs	1,207	908	862	747	+ 32.9
Stockings	35	1	*	*	--

(continued)

SHIPMENTS

Hosiery Shipments, 1980-1983
(Dozens of pairs in thousands)
(continued)

	1983	1982	1981	1980	% Change 1983/1982
Girls', boys', women's, sizes 8-11 (knit on less than 300 needles), total**	52,794	47,980	58,078	48,981	+ 10.0%
Footsocks	5,789	6,814	9,246	7,879	- 15.0
Cushion	5,361	6,398	8,477	6,741	- 16.2
Non-cushion	428	416	1,907	1,138	+ 2.9
Anklets	16,609	12,283	15,414	13,564	+ 35.2
Cushion	6,336	4,830	6,086	4,614	+ 31.2
Non-cushion	10,273	7,453	9,328	8,950	+ 37.8
Mid-calf/crew	4,906	4,548	4,166	3,206	+ 7.9
Cushion	3,736	3,493	3,083	2,448	+ 2.0
Non-cushion	1,170	1,055	1,083	758	+ 10.9
Knee-highs	24,906	23,776	28,804	24,024	+ 4.8
Cushion	9,008	7,082	9,915	7,630	+ 27.2
Non-cushion	15,899	16,694	18,889	16,394	- 4.8
Stockings (women's)	46	67	9	8	- 31.3
Waist-highs (women's)	537	492	439	300	+ 9.1
Women's & girls' hosiery (footsocks, pantyhose, stockings, tights, etc.) (knit on 300 needles or more)	164,106	153,176	147,291	144,164	+ 7.1
Pantyhose	117,788	108,242	100,617	99,442	+ 8.8
Sheer	65,694	60,721	59,332	60,153	+ 8.2
Opaque	3,320	1,833	1,209	1,017	+ 81.1
Elastomer	47,480	44,858	39,444	37,402	+ 5.8
Other	1,294	830	632	870	+ 55.9
Stockings	4,599	4,638	4,731	5,479	- 0.8
Non-stretch	1,460	1,752	1,851	2,200	- 16.7
Stretch	2,576	2,374	2,202	2,507	+ 8.5
Support	490	460	621	658	+ 6.5
Other	73	52	57	114	+ 40.4
Other women's hosiery	41,719	40,296	41,943	39,243	+ 3.5
Footsocks	473	492	508	253	- 3.9
Anklets	865	870	968	1,144	- 0.6
Knee-highs	40,348	38,916	40,467	37,846	+ 3.7
Mid-calf/crew	33	18	*	*	+ 83.3

(continued)

SHIPMENTS

Hosiery Shipments, 1980-1983
(Dozens of pairs in thousands)
(continued)

	1983	1982	1981	1980	% Change 1983/1982
Men's hosiery (size 10 & up) (knit on less than 300 needles), total	66,697	62,723	69,879	65,671	+ 6.3%
Cushion	32,669	31,516	36,269	31,850	+ 3.7
Non-cushion	34,028	31,207	33,610	33,821	+ 9.0
Footsocks	327	291	402	233	+ 12.4
Cushion	160	133	132	122	+ 20.3
Non-cushion	167	158	270	111	+ 5.7
Anklets	26,899	27,376	30,108	29,863	- 1.7
Cushion	5,340	6,449	7,795	7,548	- 17.2
Non-cushion	21,559	20,927	22,313	22,315	+ 3.0
Mid-calf/crew	18,488	17,445	18,472	16,887	+ 6.0
Cushion	9,875	10,899	11,652	9,413	- 9.4
Non-cushion	8,613	6,566	6,820	7,474	+ 31.2
Knee-highs	20,983	17,611	20,897	18,688	+ 19.1
Cushion	17,294	14,035	16,690	14,767	+ 23.2
Non-cushion	3,689	3,576	4,207	3,921	+ 3.2

* Less than 0.1%.

**According to a special NAHM survey, girls' and women's hosiery represents about 72% of the total on hosiery size 8-11, knit on less than 300 needles; boys', 28%.

Source: National Association of Hosiery Manufacturers, _Hosiery Statistics_.

SHIPMENTS

The combined total of hosiery knit on 300 needles or more and under 300 needles (size 8-11), based on NAHM data, shows total shipments of specific types of women's and girls' hosiery, and boys' hosiery as follows in 1982 and 1983.

Estimated Shipments of Specified Types of Hosiery, 1982, 1983
(dozens of pairs in thousands)

	1983	1982	% Change 1983/1982
Women's & girls'			
Knee-highs, total	58,530	55,797	+ 4.9%
300 needles or more	40,248	38,916	+ 3.4
Less than 300 needles	18,182	16,881	+ 7.7
Footsocks	6,030	7,306	- 17.5
300 needles or more	473	492	- 3.9
Less than 300 needles	5,557	6,814	- 18.4
Anklets	14,974	9,837	+ 52.2
300 needles or more	863	870	- 0.8
Less than 300 needles	14,111	8,967	+ 57.4
Mid-calf/crew	1,161	427	+171.9
300 needles or more	33	18	+ 83.3
Less than 300 needles	1,128	409	+175.8
Boys', (less than 300 needles)			
Knee-highs	6,725	6,895	- 2.5
Mid-calf/crew	3,778	4,139	- 8.7
Anklets	2,498	3,316	- 24.7
Footsocks	232	--	--

Source: Estimates based on NAHM data.

Athletic Hosiery & Bodywear

Emphasis on fitness and in active sports has made athletic hosiery and bodywear two of the fastest growing segments of hosiery. Most hosiery firms have added these to their product lines and have been devising strong promotions on their upgraded, branded lines and broadening their retail distribution patterns.

Sales volumes in 1982 of the leading manufacturers in these specialized areas of hosiery have been reported as follows:

Estimated Sales of Athletic Socks by Leading Manufacturers, 1982

	Millions of $
Neuville-Mobil Six Inc.*	$ 35.0
Adams-Millis**	35.0
Russell National	34.0
Interwoven	21.0
Burlington	20.0
Wigwam Mills	18.5
Twin City Knitting Co.	15.0

(continued)

Estimated Sales of Athletic Socks by Leading Manufacturers, 1982
(continued)

	Millions of $
Ballston Knitting Co. Inc.	$ 13.0
Ridgeview Mills	10.5
Rockford Textiles	10.0
Thor-10	7.0
SAI/Kemfast	5.5
Hanes-Millis	5.0
Softouch	3.5

* Includes Spalding and private label.
**Includes ABC Sports, Sportime and private label.

Source: SportStyle, May 23, 1983.

Estimated Sales of Bodywear/Exercise Apparel By Leading Manufacturers, 1982

	Millions of $
Danskin	$ 100.0
Flexatard	22.0
Carushka	13.0
West Grove	9.0
Stevi Brooks	7.8
Alba Waldensian	7.5
Kellwood	7.5
Scotch Maid	6.5

Source: SportStyle, May 23, 1983

Seasonal Pattern In Hosiery Shipments
Percent of Unit Shipments By Months, 1983

	Infants'/ Children's	Girls'/Boys'/Women's (Sizes 8-11)	Women's/Girls' (300 Needles +)	Men's (Sizes 10-13)
Total	100.0%	100.0%	100.0%	100.0%
January	7.2	7.2	7.4	8.0
February	7.9	7.2	7.5	7.9
March	9.0	8.9	8.2	7.6
April	7.5	8.9	9.0	7.7
May	8.6	9.0	8.3	8.8
June	11.5	8.9	7.8	8.7
July	8.9	9.1	10.8	7.8

(continued)

SHIPMENTS

Seasonal Pattern In Hosiery Shipments
Percent of Unit Shipments By Months, 1983
(continued)

	Infants'/ Children's	Girls'/Boys'/Women's (Sizes 8-11)	Women's/Girls' (300 Needles +)	Men's (Sizes 10-13)
August	7.5%	8.3%	8.0%	8.1%
September	7.9	8.8	8.1	8.1
October	8.8	8.3	8.6	7.7
November	8.3	8.2	7.3	10.5
December	6.9	7.2	8.1	9.1

Source: Based on data compiled by National Association of Hosiery Manufacturers, Inc.

FOREIGN TRADE

The U.S. hosiery industry generally enjoys a favorable balance of trade but the margin is narrowing. In 1979, a total of about 5.9 million dozen pairs of hosiery of all types were exported, and in the following year the total climbed to 7.5 million pairs. In 1983, however, total exports declined to 4.7 million dozen pairs. This was 16% below the 1982 total.

Imports, on the other hand, amounted to 3.7 million dozen pairs, up 61% over the 1982 total, but 6.4% below the total imported in 1979. The decline compared to 1979 was due entirely to a drop in imports of pantyhose, which amounted to only 1.6 million dozen pairs in 1983 compared with 3.9 million dozen pairs in 1979. The 1983 total was, however, 40% above pantyhose imports in 1982.

Half of the pantyhose exports reported in 1983 were to Costa Rica under regulation 807 which covers unfinished goods sent abroad for processing and then shipped back to the U.S. Canada is the leading customer for U.S. hosiery in terms of quantity and value. Israel and Taiwan rank among the leading sources of U.S. imports.

Hosiery Imports & Exports, 1979-1983

Imports	Thousand Dozen Pairs				
	1983	1982	1981	1980	1979
Total imports	3,697	2,294	2,193	3,127	3,948
Pantyhose	1,609	1,146	1,265	2,575	3,275
Other hosiery:					
Cotton	243	85	63	31	22
Wool	137	91	101	92	94
Man-made fiber	1,708	972	764	429	557

(continued)

Imports

Hosiery Imports & Exports, 1979-1983
(continued)

	Customs Value (thousands of dollars)*				
	1983	1982	1981	1980	1979
Total value	$23,004	$14,558	$13,913	$15,442	$15,579
Pantyhose	9,520	6,163	6,105	10,244	10,781
Other hosiery:					
Cotton	2,869	1,090	1,136	455	297
Wool	2,869	2,298	2,533	2,283	2,020
Man-made fiber	7,746	5,007	4,139	2,440	2,481

Exports

	Thousand Dozen Pairs				
	1983	1982	1981	1980	1979
Total exports	4,728	5,646	7,125	7,530	5,894
Pantyhose	966	1,159	1,091	1,314	1,507
Women's full- and knee-length hosiery	840	1,126	1,586	1,741	1,090
Other hosiery	2,922	3,361	4,448	4,475	3,297

	Value (thousands of dollars)				
	1983	1982	1981	1980	1979
Total value	$42,509	$48,441	$56,864	$54,303	$37,227
Pantyhose	8,477	9,884	7,224	7,628	8,947
Women's full- and knee-length hosiery	9,214	9,685	11,566	13,397	7,226
Other hosiery	24,818	28,872	38,074	33,278	21,054

* As valued for customs purposes. Does not include duties, freight or insurance.

Source: National Association of Hosiery Manufacturers based on U.S. Bureau of the Census reports.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Projections of the U.S. Population. 1983-2000

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990*	2000*	2000/1983	1983	1990	2000
FEMALE							
Total, all ages	120,216	128,234	137,611	+ 14.5%	100.0%	100.0%	100.0%
Under 5 years	8,713	9,369	8,601	- 1.3	7.2	7.3	6.3
5 to 9 years	7,793	9,080	9,157	+ 17.5	6.5	7.1	6.6
10 to 15 years	10,417	9,791	11,419	+ 9.6	8.7	7.6	8.3
16 years & over	93,293	99,994	108,436	+ 16.2	77.6	78.0	78.8
16-19	7,654	6,704	7,373	- 3.7	6.4	5.2	5.4
20-34	30,925	30,774	26,442	- 14.5	25.7	24.0	19.2
35-54	26,458	32,170	40,810	+ 54.2	22.0	25.1	29.6
55 & over	28,256	30,346	33,811	+ 19.7	23.5	23.7	24.6
Median age (years)	32.2	34.3	37.7	+ 17.1			
MALE							
Total, all ages	113,977	121,498	130,379	+ 14.4	100.0	100.0	100.0
Under 5 years	9,133	9,831	9,024	- 1.2	8.0	8.1	6.9
5 to 9 years	8,155	9,519	9,601	+ 17.7	7.1	7.8	7.4
10 to 15 years	10,982	10,240	11,968	+ 9.9	9.6	8.4	9.2
16 years & over	85,797	91,907	99,787	+ 16.3	75.3	75.6	76.5
16-19	7,958	6,999	7,709	- 3.1	7.0	5.8	5.9
20-34	31,162	31,301	27,071	- 13.1	27.3	25.8	20.8
35-54	25,302	31,066	40,002	+ 58.1	22.2	25.5	30.7
55 & over	21,376	22,541	25,005	+ 17.0	18.8	18.5	19.1
Median age (years)	29.6	31.8	34.9	+ 17.9			

* Middle series projections (out of three) which assumes a fertility rate of 2.1, or at the replacement level.

Note: Columns may not add to totals shown due to rounding

Source: U.S. Bureau of the Census, Series P25, No. 922
(October 1982)

Women constitute the largest market for hosiery, consuming an average of 26 pairs (including socks, etc.) per capita in 1983 compared with an overall per capita consumption of hosiery amounting to about 16 pairs. According to reports on consumer purchases of hosiery in 1983 compiled by NPD Special Industry Services (Textile and Apparel Market Index) purchases by type were divided as follows: pairs--men's, 24.8%, boys', 15.1%, women's, 50.9%, girls', 9.3%; expenditures--men's, 25.3%, boys', 11.6%, women's, 55.3%, girls', 7.8%.

THE POTENTIAL MARKET

The market potential for women's hosiery has expanded not only due to the growth in population but also to the rapid increase in the number of women in the labor force. This group requires more apparel than nonworking women and are the most open to new fashion approaches in color and texture. The expansion in the number of working women has slowed down, but as of December 1983 there was a total of 48,926,000 in the civilian labor force, of which 45,244,000 women were employed. This compares with an average of 31,257,000 women employed in 1972.

A much greater percentage of women are now in managerial or professional occupations which require more emphasis on dress. In 1982 this group represented 21.7% of all employed women compared with 17.0% in 1972.

Market potential for men's socks continues to be enhanced by the growing interest in variety, color and fashion interest in men's wardrobes. The greater emphasis on activewear and participation in fitness activities has spurred the market for athletic hosiery and many new merchandising techniques have been adopted by a greater variety of retailers who are catering to this market.

Per Capita Consumption of Hosiery Based on Supply*

Year	Total Pairs	Infants'/ Children's**	Boys', Girls', Women's Sizes 8-11***	Women's#	Men's##
1983	15.9	8.8	16.4	21.0	9.1
1982	14.9	9.0	14.7	19.7	8.5
1981	15.9	10.7	17.6	19.2	9.6
1980	15.2	10.2	15.1	19.3	9.1
1979	15.7	10.9	15.4	18.8	10.5
1975	12.8	7.9	12.7	14.6	9.7

* Shipments by U.S. mills plus imports, less exports.
**Includes boys and girls through 9 years of age.
***Includes males and females 10 to 14, and females 15 to 24 years of age.
Includes females age 15 and over.
##Includes males age 15 and over.

Source: National Association of Hosiery Manufacturers.

RETAIL SALES

The total market for hosiery of all types at retail is estimated at about $6.0 billion, with women's hosiery accounting for some 55% of the total; men's 25%; boys', 12%; girls', 8% in 1983.

Official figures on sales share by type of outlet will not be available until reports on the 1982 census of retail trade are issued by the U.S. Bureau of the Census, updating 1977 census findings. A trade publication, Supermarket Business, estimated sales of women's hosiery in 1982 at $3.2 billion of which grocery stores accounted for 19%. Figures on reported purchases by outlet type from a representative panel of consumers, compiled in the Textile and Apparel Market Index, NPD Special Industry Services, are covered in the section on BUYING HABITS.

Value of Domestic Consumption of Hosiery, 1981, 1982 & Estimated Share Held By Grocery Stores

	Thous. of $		% of Total Accounted For By Grocery Stores	
	1982	1981	1982	1981
Women's hosiery, total	$3,231,590	$3,101,110	19%	19%
Pantyhose	3,058,770	2,921,460	19	20
Stockings	172,820	179,650	6	6
Men's hosiery	1,139,700	1,031,400	4	4

Source: Supermarket Business, September 1983

Women's & Girls' Hosiery

Department stores and specialty stores account for the major share of women's upscale, fashion hosiery and bodywear; discounters and mass merchandisers are the major outlets for other types of women's hosiery.

Average Retail Price of Pantyhose By Type of Retailer, 1979-1982

	1982*	1981	1980	1979
Department/specialty stores	$ 2.20	$ 2.10	$ 2.00	$ 1.83
General mdse. chains (Sears, Penney, Ward)	1.93	1.90	1.87	1.54
Discount/variety stores	1.53	1.38	1.22	1.07
Grocery stores/supermarkets	1.71	1.53	1.49	1.38
Drug stores	1.69	1.56	1.47	1.35

* Forecast

Source: STORES (June 1981) (Based on MRCA, L'eggs Sales Research)

Women's Pantyhose & Knee-highs Sales Share Trends By Type of Retailer, 1978-1982

	1982*	1981	1980	1979	1978
Total Sales	100.0%	100.0%	100.0%	100.0%	100.0%
Department/specialty stores	17.6	18.0	18.5	19.0	18.8
General mdse. chains (Sears, Penney, Ward)	10.9	11.2	11.5	11.8	12.5
Discount/variety stores	29.4	29.2	29.2	30.2	29.5
Grocery stores/supermarkets	25.7	24.6	24.2	22.6	22.0
Drug stores	11.5	11.2	10.9	9.7	9.2
Other outlets	4.9	5.8	5.7	6.7	8.0

* Forecast

Source: STORES, (June 1981) (Based on MRCA, L'eggs Sales Research)

RETAIL SALES

Women's & Girls' Hosiery

Market share by type of outlet varies by type of pantyhose, as noted below.

Women's Pantyhose & Knee-high Sales Share
By Type of Retailer, 1980

	Non-Support	Support	Knee-Highs	Control Top	Panty Top	Total Market
Total Sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department/specialty stores	19.2	16.5	1[illegible].0	26.0	23.2	18.5
General mdse. chains (Sears, Penney, Ward)	9.0	9.5	8.6	14.0	9.4	11.5
Discount/variety stores	25.2	14.3	39.7	20.0	26.3	29.2
Grocery stores/supermarkets	28.4	33.8	22.4	25.8	15.7	24.2
Drug stores	9.9	15.4	12.9	10.1	8.7	10.9
Other outlets	8.3	10.5	5.4	4.1	16.7	5.7

Source: STORES (June 1981) (Based on MRCA, A.C. Nielsen)

A special analysis of women's nylon/spandex hosiery retail sales--estimated at $2 billion-plus in 1983--has been made in terms of hosiery type and retail outlet type. (Women's Wear Daily, April 20, 1984).

Distribution of Women's Nylon/Spandex Hosiery Sales, 1983

By Hosiery Type	
Regular sheer pantyhose	43%
Sheer Knee-highs	28
Support & control top pantyhose (elastomeric)	25
Nylon stockings	4
Total	100%

By Type of Retail Outlet	
Discount stores	20%
Supermarkets	20
Chains	20
Department stores	15
Drug stores	10
All other outlets	15
Total	100%

RETAIL MERCHANDISING & OPERATING RESULTS

Women's Hosiery Departments

Women's Hosiery & Sock Operating Performance, 1982
(Supermarkets With Total Volume of $2 Million or More)

	% of Total Soft Goods Dept. Sales	1982 Sales (Mil. $)	% Chgs. In Sales 1982/81	% of Soft Gds. Dept. Gross Profit	Gross Profit (Mil. $)	Av. Gross Margin (% of Retail)
Hosiery	54.37	$436.70	- 3.93	57.51	$175.53	40.2
Pantyhose	46.81	376.64	- 4.53	49.85	152.16	40.4
Stockings	7.48	60.06	- 0.01	7.66	23.36	38.9
Socks (all types)	8.45	67.83	+ 6.63	9.02	27.54	40.6

Source: Chain Store Age/Supermarkets (July 1983)

RETAIL MERCHANDISING & OPERATING RESULTS

Women's Hosiery Departments

Women's Hosiery Department Merchandising & Operating Results, 1982
Compared With Total Adult Female Intimate Apparel & Accessories Division
(Selected Median Results)

	Mdse. Division: Adult Female Intimate Apparel & Access.	Department: Women's Hosiery
WOMEN'S/FAMILY SPECIALTY STORES (With Total Sales Over $1 Million)	(31)*	(18)*
Cumulative markon %	52.3	50.7
Markdowns - % of net retail sales	13.3	7.5
Gross margin (incl. cash discounts) % of net sales	47.1	46.6
Stock turns (times) at retail	2.7	2.5
Net sales % change from 1981	+ 0.6	+ 15.3
Net sales % of mdse. div. (intimate apparel, access.)	100.0	2.1
$ sales per sq. ft. of selling space (main or largest selling unit)	158.3	289.0
DEPARTMENT STORES (With Total Sales Over $1 Million)	(99)*	(90)*
Cumulative markon %	51.5	49.0
Markdowns - % of net retail sales	9.3	5.2
Gross margin (incl. cash discounts) % of net sales	48.4	47.3
Stock turns (times) at retail	3.0	3.5
Net sales % change from 1981	+ 4.7	+ 12.6
Net sales % of mdse. div. (intimate apparel, access.)	100.0	13.3
$ sales per sq. ft. of selling space (main or largest selling unit)	153.7	219.1

* Number of firms reporting.

Source: National Retail Merchants Association: Department Store & Specialty Store Merchandising & Operating Results of 1982.

Men's Hosiery Departments

Typical Operating Results in Men's Hosiery in Men's Wear Stores, 1982
(Median Results)

	Total Reporting Firms		Firms Handling Men's Wear Only		Firms Handling Women's Wear	
Men's hosiery						
% to total furnishings sales	6.1	(87)	6.8	(34)	5.8	(53)
% to total store sales	1.1	(87)	1.3	(34)	0.9	(53)
% change in sales 1982/1981	+ 5.9	(72)	+ 5.3	(27)	+ 5.9	(45)
Markdowns-% of sales	2.8	(51)	1.5	(18)	3.7	(33)
Inventory turnover	2.3	(44)	2.3	(17)	2.3	(27)

Note: Figures in parentheses are the numbers of firms reporting data.

Source: Menswear Retailers of America, Business Newsletter Section II, 1982 Annual Business Survey, Men's Store Operating Experiences

RETAIL MERCHANDISING & OPERATING RESULTS

Men's Hosiery Departments

Men's Hosiery Department Merchandising & Operating Results, 1982
Compared With Total Men's Wear Departments
In Department Stores with Annual Sales Over $1 Million
(Selected Median Results)

	Total Adult Male Apparel	Men's Hosiery
	(97)	(13)*
Cumulative markon	50.5	49.5
Markdowns - % of net retail sales	14.1	2.9
Gross margins (incl. cash discounts)	43.2	47.8
Stock turns (times) at retail	2.7	3.3
Net sales % change from 1981	+ 6.5	nr
Net sales % of adult male apparel	100.0	3.1
$ sales per sq. ft. of selling space (main or largest selling unit)	184.7	nr

* Number of firms reporting. (It should be noted that only 13 department store companies broke out the data on men's hosiery. This compares with 90 reporting on women's hosiery).

nr - not reported

Source: National Retail Merchants Association: *Department Store & Specialty Store Merchandising & Operating Results of 1982.*

BUYING HABITS

The pattern in consumer purchases of apparel items is traced by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. Data are based on purchase records of a nationwide representative sample of 6,500 families. The following information summarizes detailed information on hosiery purchases reported by NPD in the Textile and Apparel Market Index.

Women's & Girls' Hosiery/Legwear

Distribution of Reported Hosiery/Legwear Purchases, 1980, 1981, 1983

	Pairs			Expenditures		
	1983	1981	1980	1983	1981	1980
Women, age 14 & older						
Total hosiery/legwear purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Pantyhose, total	45.9	45.6	43.7	56.4	59.1	60.1
Panty top	17.7	19.0	18.1	22.1	25.7	25.8
Control top	4.9	3.9	3.9	9.1	7.0	8.0
Sheer/nude top	14.6	13.3	13.0	15.3	15.1	15.0
Regular top	8.7	9.4	8.7	9.9	11.3	11.3
Knee-high hosiery	24.8	26.3	26.5	8.5	10.3	10.7
Socks	11.0	9.4	7.6	9.3	7.4	6.2
Other hosiery	15.5	16.7	20.8	15.0	13.5	17.0
Leotards/tights/bodysuits	2.8	2.0	1.4	10.9	9.7	6.0

(continued)

BUYING HABITS

Women's & Girls' Hosiery/Legwear

Distribution of Reported Hosiery/Legwear Purchases, 1980, 1981, 1983
(continued)

	Pairs			Expenditures		
	1983	1981	1980	1983	1981	1980
Girls, age 13 & younger						
Total hosiery/legwear purchases	na	100.0%	100.0%	na	100.0%	100.0%
Pantyhose		7.3	6.6		7.4	6.0
Panty top		2.2	1.6		2.9	1.8
Control top		*	*		*	*
Sheer/nude top		3.2	3.2		2.8	2.7
Regular top		1.9	1.8		1.7	1.5
Knee-high hosiery		6.9	7.8		5.0	6.5
Knee socks		36.6	37.8		34.0	33.5
Other socks		37.2	36.5		27.8	27.2
Other hosiery		0.9	0.3		0.7	0.3
Leotards, tights, bodysuits		11.1	10.9		25.1	26.4

* Less than 0.1%
na - not available

Source: NPD Special Industry Services,
Textile and Apparel Market Index

Distribution of Reported Purchases of Selected Types of Hosiery/Legwear By Place of Purchase & By Price Category, 1983

	Women's Pantyhose				Women's Knee-high Hosiery	
	Panty Top		Sheer/Nude Top			
	Pairs	Expends.	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Retail Outlet Type						
Department stores	11.5	15.8	9.7	14.8	4.2	6.8
Mass mdsrs. (incl. Sears, Penney, Ward, K-mart)	20.6	20.5	10.7	10.8	32.7	29.8
Discount stores	15.5	13.2	17.7	15.5	16.7	15.1
Specialty stores	3.6	4.2	7.4	8.4	2.1	3.4
Grocery stores/supermarkets	21.4	21.5	28.2	27.9	18.9	21.1
Variety stores	3.0	2.6	4.1	2.9	7.2	6.4
Drug stores	7.4	6.8	10.8	9.2	11.4	9.3
Other	17.0	15.4	11.4	10.5	6.8	8.1

(continued)

Women's & Girls' Hosiery/Legwear

Distribution of Reported Purchases of Selected Types of Hosiery/Legwear By Place of Purchase & By Price Category, 1983
(continued)

	Women's Pantyhose				Women's Knee-high Hosiery	
	Panty Top		Sheer/Nude Top			
	Pairs	Expends.	Pairs	Expends.	Pairs	Expends.
Total reported purchases (cont'd.)						
Price Paid						
Under $1.49	46.1	24.9	56.3	33.7	97.5*	89.4
$1.50 to $1.99	20.5	19.9	19.4	21.6	2.5	10.6
$[illegible].00 to $2.99	22.2	30.2	16.4	25.7		
$3.00 to $4.99	9.9	20.0	7.1	15.7		
$5.00 & over	1.3	5.0	0.8	3.3		

	Girls' Hosiery (Selected Types)					
	Knee Socks		Other Socks		Leotards/Tights Body Suits	
	Pairs	Expends.	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Retail Outlet Type						
Department stores	10.3	11.1	9.0	10.5	4.1	7.8
Mass mdsrs. (incl. Sears, Penney, K-mart)	29.6	32.6	41.9	37.8	26.9	18.7
Discount stores	28.9	27.4	28.5	26.7	25.8	19.6
Specialty stores	5.5	7.4	5.2	8.3	10.2	15.2
Variety stores	8.2	8.3	7.3	7.2	1.6	1.1
Grocery stores/supermarkets	5.7	4.4	2.4	2.4	23.0	24.9
Drug stores	4.1	1.7	1.1	1.2	1.2	1.8
Other	7.7	7.1	4.6	5.9	7.2	10.9
Price Paid						
Less than $1.00	72.6	51.6	71.5	52.8	na	na
$1.00 to $1.99	21.2	31.8	24.6	35.5		
$2.00 to $2.99	5.5	13.9	2.6	6.4		
$3.00 to $4.99	0.7	2.7	1.1	3.9		
$5.00 & over	--	--	0.2	1.4		

* 62% of knee-high hosiery purchases were priced at under 50 cents per pair and this price bracket represented 37% of reported dollar expenditures.

Source: NPD Special Industry Services,
Textile and Apparel Market Index.

BUYING HABITS

Teen Girls' Hosiery

In September 1982 Seventeen Magazine conducted a survey on apparel purchases made by teenage girls in preparation for going back to school. Results of the survey were projected to a total U.S. population of 8,655,000 teenage female students.

Hosiery Purchases For Back-To-School Wardrobes

	% of Total Purchasing Hosiery	Purchases		Expenditures	
		Pairs (000)	%	Thous. $	%
Total hosiery purchases	86.2%	62,687	100.0%	$167,796	100.0%
Socks - knee-length	45.8	17,437	27.8	40,977	24.5
- ankle	33.4	10,888	17.4	22,865	13.6
- crew	11.9	3,829	6.1	8,883	5.3
Pantyhose	68.2	15,691	25.0	37,481	22.4
Stockings - knee-length	21.2	6,731	10.7	12,654	7.5
- other	21.1	4,680	7.5	10,934	6.5
Leotards, tights	20.3	3,044	4.9	30,105	17.9
Body stockings	2.5	387	0.6	3,897	2.3

Source: Seventeen's Back-To-School Study, 1983

In May 1983 Seventeen Magazine conducted a survey among their panel of teenage girls on purchases for spring wardrobes, including usual place of purchase. Department stores were most frequently mentioned in regard to hosiery, followed by drug stores.

Usual Place of Purchase of Hosiery/Pantyhose
(Base: All Girls)

Total purchasing	100.0%*
Department store	40.8
Drug store	22.7
Supermarket	19.7
Discount store	16.6
Boutique/specialty store	6.7
Variety store	5.8
Other (shoe store, mail order, etc.)	0.7

* Adds to more than 100% due to multiple mentions.

Source: Seventeen's 1983 Spring Apparel Study

BUYING HABITS

Teen Girls' Hosiery

A survey of teenage girls on sports activity and related subjects was conducted by Seventeen Magazine in May 1982 which developed information on leotards purchased or received in the past year. Results projected to the total U.S. teenage female population are noted below. About two-thirds of pantyhose owned had been purchased by the teenage girl; the balance were gifts.

Ownership & Purchases of Leotards

Total teenage girls personally owning leotards	44.5%
Total number bought in the past year (000)	11,578
Total annual expenditure (000)	$79,398

Source: Seventeen's Sports Survey 1982

Men's Hosiery

The trend noted in recent years toward more casual hosiery, and apparel in general, away from dressier attire for men continued in 1983. According to data compiled by NPD Special Industry Services in the Textile and Apparel Market Index which tracks purchases reported by a nationwide, representative sample of 6,500 families, purchases of men's dress socks dropped from about 31% of total hosiery purchases in 1980 to about 26% in 1983. Athletic socks in the same period went up from 24% to over 32%.

Distribution of Reported Men's Hosiery Purchases by Type, 1980 - 1983

	Based on Pairs Purchased			Expenditures
	1983	1981	1980	1983
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Type of men's hosiery:				
Dress socks	25.9	28.9	31.3	30.4
Support socks	1.2	1.3	1.5	2.2
Casual socks	23.1	23.0	22.7	21.3
Athletic socks	32.3	25.5	23.8	30.2
Work socks	13.7	17.3	17.7	12.1
Other socks	3.7	4.0	3.0	3.9

Source: NPD Special Industry Services,
Textile and Apparel Market Index.

BUYING HABITS

Men's Hosiery

Distribution of Reported Purchases of Hosiery For Men Age 17 & Older
By Place of Purchase & By Price Classification, 1982, 1983

	1983		1982	
	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	13.5	18.6	13.0	18.6
Mass mdsrs. (incl. Sears, Ward, Penney, K-mart)	35.4	32.4	34.7	31.4
Discount stores	25.1	21.1	25.1	22.0
Specialty stores	5.7	8.1	4.0	5.3
Variety stores	6.4	5.3	7.2	6.0
Grocery stores/supermarkets	2.0	3.1	4.8	4.1
Other	11.8	11.4	11.2	12.6
Price Paid				
Under $1.50	74.4	51.5	73.9	52.0
$1.50 to $1.99	11.6	15.2	13.3	17.7
$2.00 to $2.49	4.7	7.8	4.3	7.3
$2.50 or more	9.3	25.5	8.5	23.0

Source: NPD Special Industry Services,
Textile and Apparel Market Index.

Boys' Hosiery

Purchases of boys' hosiery reported in NPD's service tracing purchases among 6,500 nationally representative families showed the following distribution patterns in 1983 and 1982:

Distribution of Boys' Hosiery Purchases by Type, 1983

	Pairs	Expenditures
Total reported purchases	100.0%	100.0%
Dress socks	5.9	5.6
Casual socks	33.9	38.7
Athletic socks	53.6	49.7
Other types	6.6	6.0

(continued)

BUYING HABITS

Boys' Hosiery

Distribution of Reported Purchases of Boys' Hosiery By Place of Purchase & By Price Classification

	1983		1982	
	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	8.5	10.0	10.4	11.3
Mass mdsrs. (Sears, Penney, Ward, K mart)	43.3	40.5	42.0	40.1
Discount stores	25.9	24.4	28.1	26.4
Specialty stores	3.8	5.9	3.8	5.6
Variety stores	7.7	6.8	6.0	5.5
Grocery stores/supermarkets	3.1	3.0	2.8	2.8
Other	7.8	9.4	6.9	8.2
Price Paid				
Under $1.00	70.4	52.4	68.1	50.0
$1.00 to $1.49	19.3	23.9	22.7	28.2
$1.50 or more	10.3	23.7	9.2	21.8

Source: NPD Special Industry Services, Textile and Apparel Market Index.

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00) (1983 Edition available now -- 1984 Edition will be available in July, 1984)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included. (May)

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, $15.00) (July)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label. (September)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers. (March)

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MEN'S SPORTSWEAR, CASUAL WEAR, JEANS & ACTIVEWEAR

Market Trends

Following a strong 3% gain in 1983 unit sales, men's wear sales in 1984 are expected to rise 2.5% in quantity, according to Kurt Salmon Associates, management consultants. Sportswear will be the dominant force in this upsurge, with sales of men's non-tailored outerwear expected to jump 8% over 1983. Other significant sales increases are expected to be registered by men's sweaters (up 6%) and slacks (up 5%).

Much of the excitement in the men's wear industry continues to stem from active sportswear, although the growth rate has slowed. The active influence has been expanded into other sportswear categories, and the term "street active" has become part of the industry vernacular. The active look has become so pervasive that the warm-up suit has become known as "the leisure suit of the '80's". Manufacturers, and retailers, keenly aware that the market for street activewear is considerably larger than the market for authentic activewear, have gone after the mainstream sportswear customer by adding more fashion to their active lines and down-playing the splashy colors of past seasons. They want to promote the concept of activewear as everyday wear.

In order to salvage market share in the maturing activewear market, manufacturers' are not only diversifying their merchandise mixes and producing new products, but they are also attempting to expand their patterns of distribution. Established manufacturers as well as hordes of new suppliers and importers now involved in the market are competing in a category now experiencing a 10 to 20% growth rate rather than the triple-digit gains of recent years.

Another mature market is the men's jeans classification and here, too, fashion has become increasingly important to sales growth. With the consumers' taste turning to dress and casual slacks rather than jeans, the injection of fashion elements such as pleated denim, into the familiar jeans construction has helped stem the sales decline. In 1983, men's jean sales were flat compared with 1982's 182 million pairs, which was 6.2% below 1981 sales. Fashion jeans accounted for 12% of sales in 1983, but are expected to rise to 20% over the next few years. According to industry sources, growth in the jeans market will be confined to between 1% and 3% annually through the '80's.

In April 1984 the major producer of jeans, Levi Strauss, announced a major attack on the activewear (including both participant and spectator) market in which it had already amassed sales of $60 million in 1983 to rank among the top 10 branded sellers of activewear (men's, women's and children's). Special efforts are to be made to broaden distribution through the smaller specialty active shops, such as running stores.

After several mild winters, men's outerwear as well as ski wear sales were revitalized during the winter of 1983-84. For fall 1984, outerwear manufacturers are relying on a host of new styles, fabrics and treatments to maintain the sales momentum. Combining leather, wool and/or cotton in one garment, known as fabric mixing, will be one of 1984's most prevelant trends. Wool and leather outerwear is also expected to do well.

Market Trends

The increased emphasis on fitness in American society will lead to a large increase in fitted woven sport shirts for the fall 1984 season, as the market perceives a softening in the knit sport shirt category.

GENERAL INDUSTRY STATISTICS

Between 1972 and 1983, the men's and boys' shirts and nightwear industry had a compound annual growth rate of 5.5% in current dollars but as measured in constant 1972 dollars, the rate declined (-0.5%), according to the Bureau of Industrial Economics. The compound annual growth rate for the men's and boys' separate trousers industry during this same period was 2.3% in current dollars and -3.5% in constant dollars.

The total value added by manufacture in the shirt and nightwear industry was an estimated $2,001 million in 1983, 10.0% more than the 1981 value added total reported in the Annual Survey of Manufactures (ASM). For the separate trousers industry, the estimated value added total reported in the 1984 U.S. Industrial Outlook was $1,184 million, only 4.6% higher than in 1981.

Estimated Value of Industry Shipments in the Men's & Boys' Separate Trousers & Shirts & Nightwear Industries, 1982, 1983

	Value of Industry Shipments (millions of $)		% Change	% Change in Constant (1972) $
	1983(e)	1982(e)	1983/82	1983/82
Men's & boys' shirts & nightwear (SIC 2321)	$3,783.3	$3,574.6	+ 5.8%	+ 1.7%
Men's & boys' separate trousers (SIC 2327)	2,251.4	2,191.7	+ 2.7	- 1.9

(e) = estimated.

Source: U.S. Department of Commerce
Bureau of Industrial Economics
1984 U.S. Industrial Outlook

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent for which information is available covering the year 1977. Results of the 1982 census will be available in mid-1984. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Men's sportswear/casual wear is not a distinct, separately reported industry. Merchandise of this type is combined in several industry classifications under the Standard Industrial Classification system, on which the following tables are based.

GENERAL INDUSTRY STATISTICS

Men's & Boys' Clothing, n.e.c. (SIC 2329*)
(Primarily Sportswear/Outerwear)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	585	615	638	- 4.9%
With 20 or more employees	381	400	407	- 4.8
Total employment (thous.)	42.8	43.4	45.6	- 1.4
Production workers (thous.)	36.7	37.2	39.1	- 1.3
Payroll (mil. $)	$395.2	$ 371.2	$ 343.3	+ 6.5
Value added by manufacture (mil. $)#	776.1	745.7	695.1	+ 4.1
Value of industry shipments (mil. $)##	1,442.9	1,331.1	1,263.9	+ 8.4
Capital expenditures, new (mil. $)	15.3	15.1	15.3	+ 1.3

Knit Outerwear Mills (SIC 2253*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	820	876	884	- 6.4%
With 20 or more employees	442	473	459	- 6.5
Total employment (thous.)	64.7	67.1	61.9	- 3.6
Production workers (thous.)	55.3	57.9	53.4	- 4.5
Payroll (mil. $)	$ 682.3	$ 637.4	$ 548.1	+ 7.0
Value added by manufacture (mil. $)#	1,440.7	1,339.1	1,096.0	+ 7.6
Value of industry shipments (mil. $)##	2,807.8	2,571.7	2,220.8	+ 9.2
Capital expenditures, new (mil. $)	50.0	48.5	35.6	+ 3.1

Leather & Sheep-Lined Clothing (SIC 2386*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	151	156	169	- 3.2%
With 20 or more employees	62	55	64	+ 12.7
Total employment (thous.)	7.5	8.0	7.0	- 6.2
Production workers (thous.)	6.8	7.2	6.3	- 5.6
Payroll (mil. $)	$ 64.1	$ 63.5	$ 56.3	+ 0.9
Value added by manufacture (mil. $)#	103.4	100.8	93.4	+ 2.6
Value of industry shipments (mil. $)##	203.4	215.3	210.4	- 5.5
Capital expenditures, new (mil. $)	2.2	0.7	1.1	+214.3

GENERAL INDUSTRY STATISTICS

Men's & Boys' Shirts & Nightwear (SIC 2321*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	758	787	779	- 3.7%
With 20 or more employees	581	593	597	- 2.0
Total employment (thous.)	103.3	115.9	120.7	- 10.9
Production workers (thous.)	91.8	103.9	108.4	- 11.6
Payroll (mil. $)	$ 916.8	$ 931.0	$ 885.5	- 1.5
Value added by manufacture (mil. $)#	1,947.3	1,813.5	1,633.5	+ 7.4
Value of industry shipments (mil. $)##	3,681.1	3,479.5	3,251.0	+ 5.8
Capital expenditures, new (mil. $)	46.3	42.5	36.2	+ 8.9

Men's & Boys' Separate Trousers (SIC 2327*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	376	393	419	- 4.3%
With 20 or more employees	279	287	302	- 2.8
Total employment (thous.)	59.1	64.1	66.6	- 7.8
Production workers (thous.)	51.4	55.8	57.8	- 7.9
Payroll (mil. $)	$ 543.8	$ 528.1	$ 507.7	+ 3.0
Value added by manufacture (mil. $)#	1,132.3	1,102.0	1,050.7	+ 2.7
Value of industry shipments (mil. $)##	2,152.1	2,006.6	1,980.5	+ 7.2
Capital expenditures, new (mil. $)	22.5	20.5	15.2	+ 9.8

(e) = estimated
na = not available.
n.e.c. = not elsewhere classified.

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2329 covers manufacturers specializing in the production of men's and boys' heavy outerwear coats and jackets, swimwear and athletic shorts, ski and snow pants and other outerwear not elsewhere classified made in cut-and-sew plants.

SIC 2253 covers mills primarily engaged in knitting outerwear (men's, women's, children's) from yarn or in manufacturing outerwear from knit fabric produced in the same mill.

SIC 2386 covers manufacturers primarily engaged in manufacturing leather and sheep-lined garments for men, boys, women and children.

SIC 2321 covers establishments primarily engaged in the manufacture of men's, youths' and boys' shirts (including dress, polo and sport shirts, but not including work shirts) and nightwear cut and sewn from purchased woven or knit fabric.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2327 covers establishments primarily engaged in the manufacture of men's, youths' and boys' separate trousers and slacks.

**Each business location is counted as a separate establishment. Data on number of establishments include only those with payrolls, as reported in County Business Patterns.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries, (called "product shipments") is covered on page 14.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1979, 1980, 1981.

Employment & Earnings

The men's and boys' shirts and nightwear industry employed an average of 91.5 thousand workers in 1983, down 0.6% from 1982. While the number of production workers remained static at 78.7 thousand, average weekly earnings rose 6.4% to $173.85. In the men's and boys' separate trousers industry, average weekly wages increased 9.1% for production workers, although their numbers fell 0.5% to 56.9 thousand in 1983.

The Bureau of Labor Statistics uses a different methodology in compiling employment data than that followed by the Census Bureau; accounting for differences in reported figures by these sources for 1981.

Employment & Earnings in the Men's Sportswear Industry, 1981 - 1983

	Annual Averages			% Change
	1983	1982	1981	1983/1982
Knit outerwear mills (SIC 2253)				
All employees (thous.)	63.6	65.6	70.5	- 3.0%
Production workers (thous.)	54.3	55.7	59.9	- 2.5
Average weekly earnings	$204.79	$191.46	$188.87	+ 7.0
Average hourly earnings	5.52	5.26	5.05	+ 4.9
Average weekly hours	37.1	36.4	37.4	+ 1.9

(continued)

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Men's Sportswear Industry, 1981 - 1983
(continued)

	Annual Averages 1983	1982	1981	% Change 1983/1982
Men's & boys' shirts & nightwear (SIC 2321):				
All employees (thous.)	91.5	92.1	97.6	- 0.6%
Production workers (thous.)	78.7	78.8	83.9	- 0.1
Average weekly earnings	$173.85	$163.33	$160.92	+ 6.4
Average hourly earnings	4.75	4.64	4.47	+ 2.4
Average weekly hours	36.8	35.2	36.0	+ 4.5
Men's & boys' separate trousers (SIC 2327)				
All employees (thous.)	65.6	65.8	70.9	- 0.3
Production workers (thous.)	56.9	57.2	61.9	- 0.5
Average weekly earnings	$184.74	$169.27	$168.59	+ 9.1
Average hourly earnings	5.02	4.85	4.67	+ 3.5
Average weekly hours	36.8	34.9	36.1	+ 5.4

Source: U.S. Bureau of Labor Statistics
Employment & Earnings

Concentration in the Industry

Number of Men's & Boys' Sportswear Manufacturing Establishments By Employment Size, 1981

	Men's & Boys' Shirts & Nightwear (SIC 2321)	Separate Trousers (SIC 2327)	Clothing, n.e.c. (SIC 2329)
Total establishments	758	376	585
Number of employees:			
Under 10 employees	104	72	120
10-49 employees	202	62	216
50-99 employees	119	52	119
100-499 employees	313	170	125
500 or more employees	20	20	5

	Knit Outerwear Mills (SIC 2253)	Leather & Sheep-Lined Clothing (SIC 2386)
Total establishments	820	151
Number of employees:		
Under 10 employees	234	67
10-49 employees	355	53
50-99 employees	105	17
100-499 employees	106	14
500 or more employees	20	--

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census
County Business Patterns 1981.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Value of Industry Shipments From Men's & Boys' Sportswear Plants
With 20 or More Employees, 1982

	No. of Establishments		No. of Employees (Thous.)	Industry Shipments	
	With 20+ Employees	With 100+ Employees		Mil. $	% from Plants With 100+ Employees
Knit outerwear mills (SIC 2253)	452	189	64.2	$2,649.6	81%
Men's & boys' shirts & nightwear (SIC 2321)	591	411	121.9	3,892.1	92
Men's & boys' separate trousers (SIC 2327)	376	287	86.6	2,247.3	94
Men's & boys' clothing, n.e.c. (SIC 2329)	455	213	59.1	1,485.9	79

n.e.c. = not elsewhere classified.

Source: Sales & Marketing Management
Survey of Industrial & Commercial Buying Power
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Location of the Industry

Pending the release of data from the 1982 Census, the latest information on industry shipments by state is contained in the 1978 Annual Survey of Manufactures. According to this source, knit outerwear manufacturers in the five largest producing states accounted for 70% of the industry's shipment value. In the men's and boys' shirts and nightwear industry, the output of manufacturers in seven states represented 68.7% of the total shipment value of the industry.

Value of Industry Shipments in the Men's & Boys' Sportswear Industry
By Leading States, 1978

	Employment (Thous.)	Value Added by Manufacture (Mil. $)	Value of Industry Shipments (Mil. $)
Knit outerwear mills (SIC 2253)			
U.S. total	72.1	$ 1,202.8	$ 2,333.3
Leading states:			
New York	16.6	238.9	559.2
Pennsylvania	12.1	252.6	449.2
Virginia	7.5	174.4	279.4
North Carolina	8.6	116.4	248.2
Massachusetts	2.6	53.2	98.7
Leading states, total	47.4	835.5	1,634.7
% of U.S. total	65.7%	69.5%	70.0%

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Value of Industry Shipments in the Men's & Boys' Sportswear Industry By Leading States, 1978
(continued)

	Employment (Thous.)	Value Added by Manufacture (Mil. $)	Value of Industry Shipments (Mil. $)
Men's & boys' shirts & nightwear (SIC 2321)			
U.S. total	116.0	$1,630.2	$3,170.3
Leading states:			
New York	6.0	150.3	540.9
Alabama	15.4	182.3	356.9
North Carolina	13.0	140.8	287.9
Tennessee	14.6	137.7	278.7
Georgia	9.8	134.8	241.3
Pennsylvania	10.2	123.9	240.0
California	5.7	119.3	231.3
Leading states, total	74.7	989.1	2,177.0
% of U.S. total	64.4%	60.7%	68.7%
Men's & boys' separate trousers (SIC 2327)			
U.S. total	65.7	983.0	1,946.6
Leading states:			
New York	2.7	118.9	310.3
Georgia	10.1	126.1	245.4
Tennessee	6.1	71.3	119.9
Mississippi	4.5	51.6	112.0
Alabama	4.5	54.5	84.5
Arkansas	3.1	45.7	73.8
Leading states, total	31.0	468.1	945.9
% of U.S. total	47.2%	47.6%	48.6%
Men's & boys' clothing, n.e.c. (SIC 2329)			
U.S. total	46.8	624.6	1,184.4
Leading states:			
New York	4.3	71.4	185.3
Tennessee	3.3	40.3	85.0
California	3.1	42.1	81.0
Pennsylvania	3.8	44.3	80.1
Leading states, total	14.5	198.1	431.4
% of U.S. total	31.0%	31.7%	36.4%

n.e.c. = not elsewhere classified.

Source: Based on U.S. Bureau of the Census
Annual Survey of Manufactures, 1978

PRODUCTION

Preliminary 1983 production figures (subject to revision) compiled by the Census Bureau indicate that U.S. production of men's jeans rose by almost a third, to 172.9 million pairs, compared with 1982. Domestic production of jean-cut casual slacks plunged 28% from the 1982 level.

Production of knit and woven sport shirts in 1983 fell 4.5% and 28.8%, respectively, versus the previous year, according to the preliminary report.

Production of Specified Types of Men's Sportswear, 1982, 1983

	Production (Thous. Units) 1983(p)	Production (Thous. Units) 1982	% Change 1983/1982
Dress & sport trousers	109,197	111,749	- 2.3%
Jeans & dungarees	172,940	130,465	+ 32.6
Jean-cut casual slacks	29,961	41,834	- 28.4
Sport shirts, total (in thous. dozen)	32,469	35,060	- 7.4
Knit (thous. dozen)	29,462	30,836	- 4.5
Woven (thous. dozen)	3,007	4,224	- 28.8

(p) = preliminary

Source: U.S. Bureau of the Census
Current Industrial Reports
M23(83)-12

Percent of Men's Sportswear Production by Months, 1983

	Dress & Sport Trousers	Jeans & Dungarees	Jean-cut Casual Slacks	Sport Shirts Knit	Sport Shirts Woven	Sweaters*
Total production	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Percent of total done in:						
January	7.4	6.7	6.8	8.4	10.4	5.6
February	8.4	7.2	7.0	8.0	7.6	6.0
March	9.4	8.4	6.8	9.1	7.8	6.0
April	8.5	8.4	5.7	8.1	7.5	7.3
May	7.9	8.8	7.1	8.8	7.5	8.1
June	9.3	10.8	12.0	9.1	7.5	8.3
July	6.5	8.2	10.9	6.3	8.4	7.8
August	9.1	8.8	9.9	8.2	8.5	10.8
September	8.4	9.9	8.9	8.7	8.5	10.5
October	8.9	8.3	8.9	8.5	8.9	12.0
November	9.3	9.4	11.2	9.0	9.6	9.5
December	6.9	5.1	4.8	7.9	7.7	8.0

*Shipments

Source: Based on U.S. Bureau of the Census
Current Industrial Reports, M23(83)-12

PRODUCTION

In the annual CIR on apparel production for 1982, the Census Bureau included figures obtained from 90 establishments which did not report 1981 production totals. Results for the two years, therefore, are not exactly comparable. In the men's sportswear classification, the new establishments represented a low of 0.3% of men's and boys' athletic shorts production in 1982 to a high of 4.7% of knit outerwear sport shirts. If comparability has been affected by more than 1%, only 1982 production data is shown in the following table.

Except for light nontailored outer jackets for men, which remained on par with 1981 production levels, the remaining sportswear categories tracked by the Census Bureau showed declines in production during 1982. Men's separate dress and sport trousers fell 5.5% below U.S. production in 1981. However, trousers produced at price points of $9 and up (manufacturers' prices) gained 6.0% and accounted for 77% of total production. Production of jeans and dungarees dropped 7.4% while knit outerwear sport shirt production was off 5.8% compared with the previous year.

Production of Specified Men's Sportswear Items
By Fabric & Construction, 1981, 1982

	Production (Thous. Units)		% Change
	1982	1981	1982/1981
Casual (nontailored) suits	79	321	- 75.4%
Woven fabric:			
All cotton & chiefly cotton	na	101	--
All man-made & chiefly man-made	na	165	--
Other fabric	na	42	--
Knit fabric	na	13	--
Casual (nontailored) sport coats	421	452	- 6.9
Woven fabric:			
All cotton & chiefly cotton	130	150	- 13.3
All man-made & chiefly man-made	87	69	+ 26.1
Other fabric	140	113	+ 23.9
Knit fabric	64	120	+ 46.7
Separate dress & sport trousers, incl. uniform	111,749	118,215	- 5.5
By price (per unit):			
Under $4.25	920	718	+ 28.1
$4.25 to $5.00	1,036	742	+ 39.6
$5.00 to $8.99	23,604	31,078	- 24.0
$9.00 to $12.49	47,963	45,126	+ 6.3
$12.50 & over	37,828	35,839	+ 5.5
Not specified	398	4,712	- 91.5
By fabric:			
Woven fabric:			
All cotton & chiefly cotton	13,772	12,283	+ 12.1
Man-made/wool blends, chiefly man-made	11,745	9,052	+ 29.7
All man-made & chiefly man-made	64,125	72,772	- 11.9
All wool & chiefly wool	6,548	6,431	+ 2.4
Other fabric	6,482	6,049	+ 7.2

(continued)

Production of Specified Men's Sportswear Items By Fabric & Construction, 1981, 1982

(continued)

	Production (Thous. Units)		% Change
	1982	1981	1982/1981
Separate dress & sport trousers (cont'd.)			
Knit fabric:			
All cotton & chiefly cotton	na	na	--
All man-made & chiefly man-made	7,645	7,689	- 0.6%
Other fabric	na	na	--
Not specified	1,396	3,939	- 64.6
Uniform trousers	5,934	6,281	- 5.5
Jeans & dungarees	130,465	140,859	- 7.4
All cotton & chiefly cotton	120,485	130,232	- 7.5
All man-made & chiefly man-made	7,969	8,674	- 8.1
Not specified	2,011	1,953	+ 3.0
Jean-cut casual slacks	41,834	51,078	- 18.1
Woven fabric			
All cotton & chiefly cotton	32,646	38,949	- 16.2
All man-made & chiefly man-made	9,042	9,268	- 2.4
Other fabric	146	2,861	- 94.9
Shorts, excluding athletic shorts	3,973	4,707	- 15.6
By fabric:			
All cotton & chiefly cotton	2,558	2,655	- 3.6
All man-made & chiefly man-made	1,167	1,932	- 39.6
Other fabric	na	na	--
Not specified	248	120	+106.7
By construction:			
Woven fabric	3,770	4,496	- 16.1
Knit fabric	74	108	- 31.5
Not specified	129	103	+ 25.2
	(Thous. Dozen)		
Heavy nontailored outer jackets except ski, including uniform	1,334	1,400	- 4.7
By construction:			
Woven fabric	1,015	1,024	- 0.9
Knit fabric	156	224	- 30.4
Not specified	163	152	+ 7.2
By fabric:			
All cotton & chiefly cotton	334	274	+ 21.9
All man-made & chiefly man-made	741	833	- 11.0
All wool & chiefly wool	64	79	- 19.0
Other fabric	na	57	--
Not specified	195	157	+ 24.2
Uniform jackets	141	173	- 18.5

(continued)

Production of Specified Men's Sportswear Items
By Fabric & Construction, 1981, 1982
(continued)

	Production (Thous. Dozen)		% Change
	1982	1981	1982/1981
Light nontailored outer jackets, including uniform	2,068		+ 0.1%*
By construction:			
Woven fabric	1,036		
Knit fabric	659		
Not specified	373		
By fabric:			
All cotton & chiefly cotton	172		
All man-made & chiefly man-made	1,547		
All wool & chiefly wool	57		
Other fabric	14		
Not specified	278		
Woven sport shirts	4,224		- 22.0*
All cotton & chiefly cotton	1,069		
All man-made & chiefly man-made	2,762		
Other fabric	62		
Not specified	331		
Knit sport shirts, except sweatshirts**	30,836		- 5.8*
By fabric:			
All cotton & chiefly cotton	10,356		
All man-made & chiefly man-made	18,055		
All wool & chiefly wool	na		
Other fabric	591		
Not specified	1,834		
By type:			
Full open front shirts	690		
Partial front opening (golf, polo-type)	8,205		
T-shirts made for outerwear, incl. tanktops	20,054		
Not specified	1,887		
Sweaters, including sweater vests, knit cardigans & pullovers	3,040		- 9.6*
All cotton & chiefly cotton	121		
All man-made & chiefly man-made	1,590		
All wool & chiefly wool	773		
Other fiber Not specified	556		

(continued)

PRODUCTION

Production of Specified Men's Sportswear Items By Fabric & Construction, 1981, 1982 (continued)

	Production (Thous. Dozen) 1982	1981	% Change 1982/1981
Men's & boys' active sportswear:			
Athletic shorts, incl. jogging shorts & tennis shorts	4,627	3,739	+ 23.7%
Sweatshirts	4,818	5,517	- 12.7
Sweat pants	1,888	na	--
Warmup or jogging suits	1,314	1,681	- 21.8
Swimwear	1,943	1,843	+ 5.4
Woven fabric	1,172		- 10.8*
Knit fabric	246		
Not specified	525		

* Represents percentage change after adjustment for comparability.
**Includes turtleneck and pullover crew neck knit shirts.

Source: U.S. Bureau of the Census
Current Industrial Reports,
Men's & Boys' Outerwear, MA23(82)-1

SHIPMENTS

In the 1984 U.S. Industrial Outlook, the 1983 value of shipments of men's and boys' separate trousers was estimated by the Bureau of Industrial Economics at $1.7 billion, a gain of 1.7% over 1982. But in constant 1972 dollars, the shipment value fell at a compound annual rate of 3.6% between 1972 and 1983. Similarly, the Bureau expected the 1983 shipment value of men's and boys' shirts and nightwear to be 5.5% higher in current dollars than the previous year but from 1972 to 1983 the constant dollar shipment value declined at a 0.5% compound annual rate.

Shipments of men's sportswear items reported on by the Census Bureau in the latest available annual Current Industrial report placed the value in 1982 at $6.7 billion --down 2.3% from the comparable total in 1981.

Registering strong growth in the activewear area were athletic shorts which were up almost 19% in value in 1982 compared with 1981. Skiwear suffered from a lack of snow as well as depressed economic conditions in 1982, reflected in a drop of almost 9% in value of shipments of skiwear. However, trade reports indicated a strong year in skiwear, as well as other activewear in 1983.

SHIPMENTS

Value of Shipments of Specified Men's Sportswear Items By All U.S. Manufacturers, 1981, 1982

(Millions of Dollars)

	1982	1981	% Change 1982/1981*
Men's sportswear, total of specified categories	$ 6,693.5	$6,854.3	- 2.3%
Casual (nontailored) suits	3.2	22.4	- 85.7
Casual (nontailored) sport coats	18.7	15.3	+ 22.2
Sport shirts, total	1,642.9	1,745.0	- 5.8
Woven	390.2	453.7	- 14.0
Knit, except sweatshirts**	1,252.7	1,291.3	- 3.0
Sweaters, including sweater vests, knit cardigans & pullovers	374.8	379.4	- 1.2
Trousers, slacks & shorts, total	3,314.3	3,358.2	- 1.3
Separate dress & sport trousers, including uniform	1,413.8	1,378.1	+ 2.6
Jeans & dungarees	1,396.3	1,430.6	- 2.4
Jean-cut casual slacks	475.8	519.1	- 8.3
Shorts, excluding athletic shorts	28.4	30.4	- 6.6
Heavy nontailored outer jackets, except ski, including uniform	352.0	350.0	+ 0.6
Light nontailored outer jackets, including uniform	267.3	263.8	+ 1.3
Active sportswear (men's & boys')	720.3	720.2	--
Athletic shorts, including jogging & tennis shorts	164.8	138.6	+ 18.9
Sweatshirts	269.8	278.0	- 2.9
Warmup or jogging suits	104.7	124.9	- 16.2
Swimwear	118.3	110.1	+ 7.4
Skiwear, including jackets & pants	62.7	68.6	- 8.6

* Figures for the two years are not exactly comparable due to the 1982 inclusion of 90 establishments, for which earlier information was not obtained. These new establishments generally represented 1%, but not more than 4.7% (knit outerwear sport shirts) of 1982 production.

**Includes turtleneck and pullover crew neck knit shirts.

Source: U.S. Bureau of the Census
Current Industrial Reports
Men's & Boys' Outerwear MA23E(82)-1

The trend in the past two years has been for a proliferation of manufacturers and importers into the activewear/sportswear market, while established suppliers have broadened their lines.

Leading U.S. Manufacturers of Specified Active Sportswear, 1982
(Including both men's & women's wear)

Tennis & Golf Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Robert Bruce	$ 60.0
Munsingwear	40.0
Jockey	33.0
Loomtogs/Fred Perry	23.5
Difini	16.0
Fila*	15.0
Newcombe Active Sportswear	12.5(e)

General Activewear

Leading Manufacturers	1982 Sales (Mil. $)
Izod	$450.0(e)
Bassett-Walker	240.0(e)
Tultex	231.4
Sale Knitting	210.0(e)
Jantzen	165.0(e)
Ocean Pacific	144.0
Catalina	105.0(e)

Ski Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Head**	$ 34.0(e)
Sport-Obermeyer	20.0
CB Sports	16.5
Roffe	13.0(e)
Skyr	10.1

Outdoor Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Woolrich	$106.0
Pacific Trail	63.1
Jan Sport	28.0
The North Face	22.0
Patagonia	15.0(e)

Bodywear/Exercise Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Danskin	$100.0(e)
Flexatard	22.0
Carushka	13.0
West Grove	9.0(e)

Athletic Footwear Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Adidas	$140.0(e)
Nike	96.9
Etonic	8.0(e)
New Balance	8.0(e)

Competitive Runningwear

Leading Manufacturers	1982 Sales (Mil. $)
Dolfin	$ 12.5
Sub-4	8.0
Bill Rodgers & Co.	6.5
Frank Shorter	3.1
Women on the Run	3.0

Competitive Swimwear

Leading Manufacturers	1982 Sales (Mil. $)
Speedo	$ 30.0
Arena	10.0
The Finals	3.2(e)
Hind-Wells	2.5
Ocean Pool	1.5(e)
Gulbenkian	1.5(e)

(e) = estimated.
* Also includes skiwear & swimwear.
**Also includes Head swimwear, tenniswear, runningwear & Tyrolia skiwear.

Source: SportStyle May 23, 1983

PRODUCER PRICE TRENDS

Producer (factory) prices of men's and boys' wear in 1983 averaged a 1.2% increase from 1982, almost identical to the 1.3% rise for all commodities. Among specific sportswear items tracked by the Bureau of Labor Statistics, men's lightwear outer coats jumped the most compared with 1982 (+6.0%) while men's chiefly cotton trousers decreased by 2.9%.

As of March 1984 factory prices for all men's and boys' apparel increased 0.2% from February prices and 2% from March 1983 prices according to the BLS.

Producer Price Index of Selected Men's Sportswear Items, 1982, 1983
(1967=100 unless otherwise specified)

	Annual Averages		% Change
	1983(p)	1982	1983/1982
All commodities	303.2	299.3	+ 1.3%
All apparel	196.8	194.4	+ 1.2
Men's & boys'	222.2	219.5	+ 1.2
Men's trousers, except uniform, chiefly cotton (Dec. 1981 = 100)	101.6	104.6	- 2.9
Men's trousers, except uniform, chiefly wool (Dec. 1981 = 100)	103.6	100.9	+ 2.7
Men's trousers, except uniform, other fabrics (Dec. 1981 = 100)	104.5	103.6	+ 0.9
Men's denim jeans & jean-cut casual slacks (Dec. 1981 = 100)	99.9	99.4	+ 0.5
Men's corduroy jeans & jean-cut casual slacks (Dec. 1981 = 100)	97.8	na	--
Men's jeans & jean-cut casual slacks*	102.8	na	--
Men's knit pullover golf apparel (Dec. 1977 = 100)**	131.1	131.4	- 0.2
Men's lightweight outer coat (Dec. 1977 = 100)	149.1	140.6	+ 6.0

(p) = preliminary.
* Average based on 8 months of 1983.
** Average based on 7 months of 1983.

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

According to the Bureau of Industrial Economics (1984 U.S. Industrial Outlook), imports of men's & boys' shirts and nightwear grew at a compound annual rate of 16.0% between 1972 and 1983. In 1983, these imports accounted for approximately 38.8% of apparent consumption in the U.S. (domestic shipments plus imports minus exports). Their import value was estimated at $1.8 billion, 5.4% higher than in 1982.

FOREIGN TRADE

Imports

Imports of men's and boys' separate trousers, estimated at $634 million in 1983, represented 27.2% of apparent consumption that year. Between 1972 and 1983, imports of these goods jumped at an 18.4% compound annual rate of growth.

As measured by the Census Bureau, 1983 imports of men's and boys' sportswear were valued at $2.1 billion, a 7.6% rise over 1982. Men's and boys' shirt imports constituted more than half of the total import value and, at $1.2 billion, gained 2.0% versus 1982. Imported knit shirts increased 18.7% in value to $575.3 million in 1983 while woven shirt imports fell in value by 9.1%.

Quantity & Value of Imports of Men's & Boys' Sportswear Items
By Leading Countries of Origin, 1982, 1983

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Specified men's & boys' sportswear items, total	43,039.2	40,656.3	+ 5.9%	$2,074.7	$1,928.6	+ 7.6%
Trousers, slacks & shorts, total	10,372.0	8,056.0	+ 28.7	599.3	482.1	+ 24.3
Wool, not knit	274.5	235.0	+ 16.8	46.2	40.0	+ 15.5
China	91.5	75.1	+ 21.8	10.2	8.3	+ 22.9
Korea	91.4	69.2	+ 32.1	14.4	10.7	+ 34.6
Cotton, not knit	6,058.0	4,808.6	+ 26.0	368.3	309.4	+ 19.0
Hong Kong	2,019.6	1,923.6	+ 5.0	148.1	146.5	+ 1.0
China	1,064.9	575.5	+ 85.0	46.2	29.2	+ 58.2
Man-made fibers, not knit	4,039.5	3,012.4	+ 34.1	184.8	132.7	+ 39.3
Taiwan	2,114.7	1,726.2	+ 22.5	97.3	71.1	+ 36.8
China	841.7	580.9	+ 44.9	30.0	21.4	+ 40.2
Shirts, total	29,639.1	29,599.1	+ 0.1	1,241.0	1,216.8	+ 2.0
Not knit, total	15,759.1	17,550.8	- 10.2	665.7	732.1	- 9.1
Sport cotton corduroy	157.2	206.0	- 23.7	9.9	12.7	- 22.0
China	48.5	95.0	- 48.9	2.9	5.8	- 50.0
Sport, cotton except corduroy	4,662.6	5,388.3	- 13.5	211.7	231.3	- 8.5
Hong Kong	1,595.4	1,804.6	- 11.6	82.5	90.8	- 9.1
Wool	173.3	164.2	+ 5.5	14.0	13.0	+ 7.7
Korea	164.5	153.2	+ 7.4	12.9	11.6	+ 11.2
Man-made fibers	10,766.0	11,792.3	- 8.7	430.1	475.1	- 9.5
Korea	5,725.8	6,074.8	- 5.7	211.2	222.8	- 5.2
Taiwan	3,119.1	3,685.9	- 15.4	138.6	161.2	- 14.0
Knit, total	13,880.0	12,048.3	+ 15.2	575.3	484.7	+ 18.7
Cotton, nspf	7,452.5	6,111.0	+ 21.9	326.6	261.2	+ 25.0
Pakistan	1,486.1	1,033.3	+ 43.8	10.3	7.6	+ 35.5
Hong Kong	1,350.3	1,375.0	- 1.8	84.7	78.5	+ 7.9
Wool, nspf	78.8	59.9	+ 31.5	8.0	7.7	+ 3.9
Hong Kong	44.6	41.4	+ 7.7	4.6	5.3	- 13.2
Man-made fibers, nspf	6,348.7	5,877.4	+ 8.0	240.7	215.8	+ 11.5
Hong Kong	2,479.0	2,333.4	+ 6.2	90.9	81.2	+ 11.9
Taiwan	1,936.6	1,964.8	- 1.4	79.5	78.9	+ 0.8

(continued)

Imports

Quantity & Value of Imports of Men's & Boys' Sportswear Items By Leading Countries of Origin, 1982, 1983 (continued)

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Sweaters, total	3,028.1	3,001.2	+ 0.9%	$ 234.4	$ 229.7	+ 2.0%
Wholly or in part cashmere, knit	21.9	20.9	+ 4.8	11.1	11.4	- 2.6
Hong Kong	4.4	4.4	--	2.2	2.1	+ 4.8
Sheep-like hair, except cashmere, knit	112.7	105.1	+ 7.2	12.9	11.4	+ 13.2
Hong Kong	42.6	46.3	- 8.0	5.0	5.2	- 3.8
Wool, nspf	921.8	894.3	+ 3.1	99.5	94.4	+ 5.4
Hong Kong	336.7	346.3	- 2.8	37.9	38.1	- 0.5
Cotton	150.8	127.6	+ 18.2	17.9	13.8	+ 29.7
Hong Kong	68.9	71.8	- 4.0	8.9	8.1	+ 9.9
Taiwan	19.0	11.5	+ 65.2	1.9	0.9	+111.1
Man-made fibers	1,820.9	1,853.3	- 1.7	93.0	98.7	- 5.7
Taiwan	733.4	605.5	+ 21.1	40.0	37.8	+ 5.8
Korea	606.3	665.7	- 8.9	29.9	33.8	- 11.5

nspf = not specially provided for.

* The C.I.F. (cost, insurance, freight) value represents the value of imports at the first port of entry into the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census
U.S. General Imports FT 135
December 1982, 1983

Exports

Exports of men's and boys' shirts and nightwear were valued at an estimated $101 million in 1983, according to the Bureau of Industrial Economics, 27.5% below the 1982 export value. Since 1972, exports in this category have risen at a compound annual rate of 14.9%.

Separate trouser exports were valued at about $33.5 million in 1983, almost a quarter below the 1982 total of $44.6 million. In the period 1972-1983, exports of men's and boys' separate trousers increased at a compound 4.1% annual rate.

Since 1981, total U.S. exports of apparel has fallen 40%, largely because of unfavorable exchange rates and the recession in Europe. In 1983, the value of men's and boys' sportswear exports slid 19.6% to $137.4 million.

FOREIGN TRADE

Exports

Quantity & Value of Exports of Men's & Boys' Sportswear Items, 1982, 1983

	Quantity (Thous. Dozen)			Value* (Mil. $)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Specified men's & boys' sportswear items, total	4,171.6	5,085.0	- 18.0%	$137.4	$171.0	- 19.6%
Trousers, slacks & shorts, total	1,916.2	2,064.4	- 7.2	78.1	89.1	- 12.3
Not knit, total	1,712.1	1,848.8	- 7.4	70.9	80.2	- 11.6
Trousers & slacks:						
Denim, including brushed denim, cotton	498.2	549.6	- 9.3	35.3	44.5	- 20.7
Cotton	467.0	642.7	- 27.3	15.3	17.3	- 11.6
Man-made fibers	347.8	400.6	- 13.2	9.5	10.6	- 10.4
Trousers, slacks & shorts, wool	5.3	9.9	- 46.5	0.3	0.4	- 25.0
Shorts, cotton	34.5	20.8	+ 65.9	0.9	0.6	+ 50.0
Shorts, man-made fibers	359.3	225.2	+ 59.5	9.6	6.8	+ 41.2
Knit, total	204.1	215.6	- 5.3	7.2	8.9	- 19.1
Trousers & slacks, cotton	112.3	119.1	- 5.7	3.4	5.3	- 35.8
Trousers & slacks, man-made fibers	49.9	55.0	- 9.3	2.3	2.3	--
Shorts, man-made fibers	28.9	15.2	+ 90.1	1.0	0.5	+100.0
Shorts, cotton	13.0	26.3	- 50.6	0.5	0.8	- 37.5
Shirts, total	1,622.6	2,173.8	- 25.4	34.5	48.0	- 28.1
Not knit, total	333.3	455.0	- 26.7	6.4	8.4	- 23.8
Sport, cotton	153.3	188.5	- 18.7	2.9	3.6	- 19.4
Sport, man-made fibers	129.6	212.3	- 38.9	1.4	2.0	- 30.0
Wool	1.8	4.9	- 63.3	0.2	0.3	- 33.3
Textile materials, except cotton, wool & man-made fibers	48.6	49.3	- 1.4	1.9	2.5	- 24.0
Knit	1,289.3	1,718.8	- 25.0	28.1	39.6	- 29.0
Sport, cotton	233.9	360.9	- 35.2	6.4	10.8	- 40.7
Wool	3.8	6.8	- 44.1	0.3	0.4	- 25.0
T-shirts, except all white, cotton	713.5	974.0	- 26.7	15.4	19.2	- 19.8
T-shirts, except all white, man-made fibers	185.4	171.8	+ 7.9	3.0	3.9	- 23.1
Textile materials, except cotton, wool or man-made fibers	152.7	205.3	- 25.6	3.0	5.3	- 43.4
Sweatshirts, cotton	410.1	558.5	- 26.6	17.8	22.5	- 20.9
Sport & sweatshirts, man-made fibers	198.7	238.4	- 16.6	5.9	9.2	- 35.9
Sweaters, knit, total	24.0	49.9	- 51.9	1.1	2.2	- 50.0
Wool	3.3	9.5	- 65.3	0.3	0.8	- 62.5
Cotton	8.2	17.7	- 53.7	0.3	0.5	- 40.0
Man-made fibers	12.5	22.7	- 44.9	0.5	0.9	- 44.4

* The export value is equivalent to the f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of export.

Source: U.S. Bureau of the Census
U.S. Exports FT 410 December 1982, 1983

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to Census Bureau population projections, the number of American males aged 25-34 years of age will swell to 21.7 million in 1990, an 11.3% increase over 1982, before declining to 18.2 million persons by the year 2000. During the same time period, the ranks of males aged 35-44 years will continue on an upward spiral and number approximately 21.8 million men in the year 2000, up 58.0% over 1982. More than a fifth (21.5%) of the male population will fall into this age bracket at the turn of the century, making it the grouping with the largest concentration of men. Males aged 25-34 and 45-54 will each represent 18.0% of the male population by 2000.

Estimated Male Population of the U.S., 1982 & Projections to 2000*
(In Millions)

					Percent of Total Males		
	1982	1985	1990	2000	1982	1990	2000
U.S. total	112.5	116.1	121.0	129.9	100.0%	100.0%	100.0%
Under 15 years	26.3	26.5	27.9	28.6	23.4	22.8	22.0
15 years & older	86.2	89.6	93.1	101.3	76.6	77.2	78.0
15-19 years	10.1	9.4	8.6	9.6	11.7	9.2	9.5
20-24 years	10.9	10.8	9.2	8.5	12.6	9.9	8.4
25-34 years	19.5	20.9	21.7	18.2	22.6	23.3	18.0
35-44 years	13.8	15.8	18.7	21.8	16.0	20.0	21.5
45-54 years	10.8	10.9	12.3	18.2	12.5	13.2	18.0
55-64 years	10.3	10.4	9.9	11.3	11.9	10.6	11.1
65 years & older	10.8	11.5	12.6	13.7	12.5	13.5	13.5
Median age (years)	29.4	30.2	31.8	34.9			

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census
Current Population Reports
P-25 Nos. 922 & 929

Active Sports Participation

In a 1982 survey underwritten by the Miller Brewing Co. and conducted by Research & Forecasts, New York, the five most popular participatory sports for men aged 15 and over were swimming, jogging, softball/baseball, calisthenics and bicycling. In each of these activities, better than four out of 10 men in the nationally representative sample participated at least once a month (in season).

Another important spur to activewear sales is the extent to which men watch sporting events. The activewear brand worn or endorsed by a favored athlete can often lead to a purchase of the brand by the spectator. At least a fifth of the males surveyed reported that they are always or usually interested in tennis, track and field, skiing and/or gymnastics--sports where viewers can see a wide range of activewear brands and styles.

Male Participation in Specified Sports
(Percent of Men Aged 15 & Over)

	Participate Once a Month or More (In Season)
Swimming	54%
Calisthenics	46
Jogging	48
Bicycling	42
Softball/baseball	47
Bowling	25
Weightlifting	37
Basketball	34
Football/rugby	33
Tennis, racquet sports	30
Pool	32
Boating	28
Table tennis	21
Volleyball	19
Skiing	17
Golf	18
Gymnastics	5
Soccer	12
Handball	6
Wrestling	8
Horseback riding	9
Archery	8
Fencing	2
Aerobic dancing	2
Lacrosse	2
Hockey	6
Other team sports	8

Source: Miller Lite Report on American Attitudes Toward Sports 1983

Male Height/Weight Groups

The following table covers 1983 estimates on the current adult male population (18-74 years of age) in specified height/weight groups, based on an analysis of information from the U.S. Department of Health, Education and Welfare (now renamed the Department of Health and Human Services) and the U.S. Census Bureau.

Close to 2.6 million men, 3.3% of the adult male population, stand six feet two inches or taller. At the other end of the spectrum, over 10 million men, 13.6% of males, are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch to six feet one inch height range.

THE POTENTIAL MARKET

Male Height/Weight Groups

Distribution of the U.S. Male Population by Height/Weight Groups, 1983
(Numbers in Thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
Total, 18-74 years	78,116	10,624	28,044	36,870	2,578
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	17,576	5,312	7,187	4,921	156
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	32,652	3,906	13,826	14,530	391
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	15,389	938	4,687	9,061	703
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,374	391	1,952	6,249	781
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,125	78	391	2,109	547
Percent	4.0%	0.1%	0.5%	2.7	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979 & U.S. Bureau of Census population projections.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

The active look has become the dominant influence in the men's wear field. Activewear is being used as a term to describe almost any clothing that is worn when work is over. Designs, colors and even fabrics (fleece, for example) formerly associated only with activewear have been modified by traditional sportswear makers for their own garments. The sales success of active sportswear has spawned separate main floor active sportswear departments in many department stores across the country.

In a 1982 survey conducted by Leo Shapiro & Associates, 22.5% of the men surveyed said that price was the most important factor in picking an outlet to purchase active sportswear. A fifth of the survey participants mentioned quality as the main reason for their choice of an outlet, the same percentage which named the store's selection as the primary reason for shopping for active sportswear there.

Estimated retail sales of men's active sportswear during the 1983 season (covering October 1982-September 1983 purchases) reached $1.3 billion, 5.0% higher than the previous season, based on an analysis of sales figures released by the National Sporting Goods Association. In the 1983 season, sales of men's elastic waist shorts jumped 10.1% to approximately $219 million. Sweat shirt sales climbed 11.9%, the largest percentage increase recorded in the NSGA report, to $123 million.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

Estimated Retail Sales of Men's Active Sportswear, 1982, 1983
(Millions of Dollars)

	1983(e)	1982(e)	% Change 1983/1982
Swimwear	$ 151.8	$ 146.0	+ 4.0%
Golf clothing	160.5	153.0	+ 4.9
Parkas-down/fiber-filled	150.5	147.5	+ 2.0
Shorts-elastic waist	219.0	199.6	+ 9.7
Skiwear	122.0	116.0	+ 5.2
Sweat shirts	123.1	110.0	+ 11.9
Tennis clothing	90.6	86.5	+ 4.7
Vests-down/fiber-filled	116.8	116.6	+ 0.2
Warmup suits	178.5	175.0	+ 2.0
Total	1,312.8	1,250.2	+ 5.0

(e) = estimated.

Source: Fairchild Market Research Department based on National Sporting Goods Association *The Sporting Goods Market in 1982, 1983*

Men's Jeans

Jean sales throughout the 1980's are expected to be sluggish, growing only 1%-3% annually, according to a consensus of executives interviewed by *Daily News Record* (April 3, 1984). The primary reason for the slowed growth rate is the expected lowered numbers of men aged 15 to 24 years old, the heaviest jeans-buying group, over this time frame. (See POTENTIAL MARKETS section).

Consequently, emphasis in the future will be placed on new styles and designs, in the hopes that fancy jeans will appeal to the increasing segment of men aged 25-44 years, who grew up wearing basic five-pocket jeans and are now turning more to casual slacks. Stretch denim is also being touted by industry sources as a sales booster because it offers comfort, fit and ease of care to the older jeans wearer. It is estimated that stretch jeans may account for about 10% of all jeans sales in the near future.

A nationally-representative study of 150,000 households in the U.S., conducted by NFO Research, Inc., found that 6.4% of men's and boys' jeans sold between January and October 1983 were purchased at off-price retailers (including factory outlets).

RETAIL SALES BY STORE TYPE

The retail market for men's sportswear--particularly activewear--has grown increasingly competitive. Sporting goods stores, which have always held a major share of apparel for active sports participants, have broadened their apparel stocks to include the active looks sought by nonparticipants, while department stores and chains have become more competitive in trying to attract the sports participants.

Trade reports indicate that the men's wear market has become stratified by brand name. Sports stores opt more for the authentic brands like Adidas, Nike and Puma, while department and specialty stores make their activewear statements via collections by Jantzen, Catalina, Saratoga, Jockey and other traditional sportswear makers. Many stores are increasing their private label business in an effort to offer more fashion and unique items. Warmups, knit shirts and pull-on pants are currently the major activewear styles. In sporting goods stores, men's specialty stores and department stores, warmups in all prices, from private labels to designer labels and in a variety of fabrications continue to prove their selling power, making up as much as a third of some stores' men's wear business, according to Daily News Record (Feb. 20, 1984).

Sporting Goods & Sports Specialty Stores

Figures on the number of sporting goods stores and sports specialty stores are not currently available but should be reflected in reports to be issued by the Census Bureau on the 1982 census of retail trade.

Trade sources indicated that the trend has been for sporting goods stores to increase their emphasis on sportswear, getting into the types designed for the nonparticipant who wants to have the active look as well as activewear for the sports participant.

In the latter type, sports specialty stores, pro shops and sporting goods stores tend to dominate the market. According to an analysis of the distribution patterns of major tenniswear suppliers in the U.S., for example, sports specialty stores accounted for an average 43%, pro shops 26%, sporting goods stores 15%, department stores 14%, other outlets 2%. (SportStyle, April 11, 1983).

A 1981 analysis of the share of functional activewear sales held by type of retail outlet compiled by Celanese Corp. showed sporting goods stores accounting for 43%, pro shops 10%, specialists 14%.

Market Share of Functional Activewear, 1981

	Percent
Sporting goods stores	43%
Department stores	22
Specialists	14
Mass merchants	11
Pro shops	10

Source: Celanese Corp.

RETAIL SALES BY STORE TYPE

Sporting Goods & Sports Specialty Stores

These figures cover both men's and women's activewear. Men preferred sporting goods stores for their activewear to a greater extent than women, according to the Celanese study, particularly younger men.

Men's Wear Stores

Number of Stores & Sales of Men's Wear Stores
1980 - 1983

	1983	1982	1981	1980	% Change 1983/1982	% Change 1983/1980
Total sales (mil. $)	$8,170	$8,045	$8,152	$7,813	+ 1.6%	+ 4.6%
No. of stores*	na	na	17,163	18,106	na	na

* Includes only stores with payrolls.

Source: U.S. Bureau of the Census
Monthly Retail Sales, December 1983
County Business Patterns 1980, 1981

Men's sportswear typically accounted for 28% of sales in men's wear stores which participated in the 1982 Annual Business Survey sponsored by the Menswear Retailers of America. In these stores, the initial markup for men's sportswear was a median 52.7% in 1982, while markdowns were typically 14.8%.

Among sportswear categories, actionwear sales in 1982 were up a median 16.0% compared with the previous year. Median sales of jeans carried in men's wear stores surveyed were down 9.3% versus 1981.

Merchandising & Operating Results of Men's Sportswear Items
In Men's Wear Stores, 1982
(Median Results)

	Sales			Markdowns,	
	% Change From Last Year (72)*	% of Total Store (87)*	% Within Department (87)*	% of Sportswear Sales (51)*	Number of Stock Turns (44)*
Total store	+ 0.8%	100.0%	--	13.5%**	2.0
Sportswear, total	+ 0.6	22.4	100.0%	14.8	2.2
Sport shirts	- 5.5	7.1	32.6	15.5	2.6
Sweaters	+ 3.8	3.4	15.3	13.6	2.4
Actionwear	+ 16.0	1.1	5.2	17.4	2.2
Casual slacks	+ 7.0	3.4	17.4	12.6	2.3
Jeans	- 9.3	3.6	14.2	14.0	2.1
Jackets & heavy outerwear	- 0.6	3.7	15.7	17.5	2.0
Coordinated leisurewear	- 27.4	0.8	3.1	21.1	2.1

*Number in parenthesis refers to the number of reporting firms in each category.
**Markdowns as a percent of total store sales.

Source: Menswear Retailers of America
1982 Annual Business Survey

RETAIL SALES BY STORE TYPE

Men's Wear Stores

The typical men's wear store in the MRA survey sold $101.90 worth of goods per square foot of total store area in 1982. Net profit before taxes for this typical retailer was 2.7% of 1982 sales. Total expenses consumed 40.3% of sales that same year.

Ratios of Financial Performance for Men's Wear Stores
By Sales Size of Store, 1982
(Median Results)

	Men's Wear Stores With 1982 Sales of:				
	Under $300,000 (35)*	$300,000-499,999 (40)*	$500,000-999,999 (57)*	$1 Million-3,499,999 (40)*	$3,500,000 & Over (25)*
Current assets to current liabilities	4.2	3.7	3.7	2.9	2.4
Quick ratios**(times)	0.9	1.0	1.5	1.3	0.9
Net profits on net sales (percent)	1.1%	3.9%	2.7%	3.1%	2.9%
Net profits on net worth (percent)	5.1	12.7	8.2	10.1	11.1
Net profits on net working capital	5.7	15.7	6.3	11.1	11.7
Net sales to net worth (times)	3.1	3.7	3.4	3.5	5.6
Total liabilities on net worth	53.1%	57.3%	42.6%	72.8%	94.0%

* Number in parenthesis refers to the number of reporting firms in each category.
**The quick ratio eliminates inventory and prepaid items from current assets and is obtained by dividing the quick assets by current liabilities.

Source: Menswear Retailers of America
1982 Annual Business Survey

Department Stores

Department store sales of active sportswear in 1982 gained a median 10.1% compared with 1981, well above the median rise for the entire store (excluding budget departments) of 3.8%. Casual wear jacket and slack sales increased 8.7% in the typical department store reporting to the National Retail Merchants Association.

While overall sales per square foot of selling space reached a typical $109.00 for these department stores in 1982, sales per square foot in the men's active sportswear department were a much higher $207.60. Stock turnover rates in men's sportswear categories averaged higher than the overall figure for adult male apparel, particularly in sweaters.

RETAIL SALES BY STORE TYPE

Department Stores

Merchandising & Operating Results of Men's Sportswear Departments In Department Stores With Sales Over $1 Million

(Median Results)

	Adult Male Apparel (97)*	Casual Wear-Jackets & Slacks (46)*	Sport Shirts (31)*	Sweaters & Vests (24)*	Active Sportswear (43)*
Net sales, % change from last year	+ 6.5%	+ 8.7%	+ 0.4%	+ 6.6%	+ 10.1%
Sales, % to total store	12.8	3.1	1.5	0.9	0.7
Net sales, % of adult male apparel	100.0	21.8	11.9	7.0	5.4
$ sales per sq. ft. of selling space (main or largest unit)	$184.7	$126.1	$152.0	na	$207.6
Cumulative markon, %	50.5	49.8	51.3	52.0	50.7
Gross margin, % of net sales (incl. cash discounts)	43.2	41.0	45.6	46.1	44.7
Markdowns, retail, % of sales	14.1	16.4	15.1	15.2	13.7
Number of stock turns (times)	2.7	2.9	3.8	4.2	3.1
Sales promotion, % of net sales	3.0	3.7	4.8	na	3.3

*Number in parenthesis refers to the number of reporting companies.

Source: National Retail Merchants Association
Merchandising & Operating Results of 1982
1983 edition

ADVERTISING

Percent of 1982 Newspaper Ad Linage Done By Retailers Each Month

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Slacks & jeans	3.5%	6.6%	6.3%	7.9%	8.1%	11.8%	5.5%	13.4%	8.1%	8.9%	9.0%	10.9%	100.0%
Sportswear & accessories	5.1	5.1	6.2	6.3	7.2	13.9	5.4	8.6	6.2	9.0	11.8	15.2	100.0

Source: The Advertising Checking Bureau
Neustadt Reports Div. based on newspaper
advertising in Chicago, Philadelphia,
Cincinnati, Cleveland, Dallas, Los Angeles
and Washington, D.C.

CONSUMER PRICE TRENDS

Retail prices for men's coats and outer jackets in February 1984 remained unchanged from the same month a year ago, according to the Bureau of Labor Statistics, and declined a steep 3.5% compared with the January 1984 CPI. Over the 12 month period ended February 1984, men's shirt prices stayed the same while dungarees, jeans and trousers rose 0.6% at retail. Compared with January 1984 prices, men's shirts increased 3.0% in February; dungarees, jeans and trouser prices were up 1.4%.

Consumer Price Index of Specified Men's Sportswear Items
(December 1977=100 unless otherwise specified)

	Annual Averages			% Change
	1983(p)	1982	1981	1983/1982
All items (1967=100)	298.9	289.1	272.4	+ 3.4%
Apparel commodities less footwear (1967=100)	181.0	177.0	174.0	+ 2.3
Men's apparel	119.0	116.0	111.7	+ 2.6
Coats & jackets	101.5	100.0	98.7	+ 1.5
Shirts	123.6	122.4	118.7	+ 1.0
Dungarees, jeans & trousers	112.5	110.3	106.3	+ 2.0

(p) = preliminary.

Source: U.S. Bureau of Labor Statistics.

CONSUMER BUYING HABITS

In a September 1983 survey undertaken by R.H. Bruskin Associates for Daily News Record (September 29, 1983), a fifth of the nationally representative sample of 500 men said that, in the 12 months following the survey, purchases of active sportswear items will increase in relation to the amount spent on activewear in the year prior to the survey. Almost a third (32.6%) of the men and women aged 18-34 years intend to raise their level of spending on active sportswear over this period.

Intention To Purchase Active Sportswear Compared With Previous 12 Months

	Intend to Purchase:						
	Much More	Somewhat More	About the Same	Somewhat Less	Much Less	None	Don't Know
Total	8.2%	13.6%	52.4%	9.1%	11.4%	4.2%	1.1%
By Sex							
Male	7.6	14.9	56.7	7.0	8.2	4.1	1.5
Female	8.8	12.3	48.5	11.1	14.2	4.3	0.8
By Age							
18-24 years	15.6	16.5	48.7	8.6	9.6	1.0	--
25-34 years	11.5	21.7	46.3	10.8	8.3	1.0	0.5
35-49 years	5.7	15.9	60.0	7.1	8.4	1.9	1.0
50-64 years	4.1	7.3	61.2	7.7	15.2	3.3	1.3
65 years & older	3.5	4.6	45.7	10.9	14.8	17.4	3.1

(continued)

Intention to Purchase Active Sportswear Compared With Previous 12 Months
(Continued)

	Intend to Purchase:						
	Much More	Somewhat More	About the Same	Somewhat Less	Much Less	None	Don't Know
By Income							
Under $15,000	8.1%	6.3%	47.1%	11.8%	16.6%	8.4%	1.7%
$15,000-19,999	9.9	10.7	50.4	10.0	12.8	6.3	--
$20,000-29,999	10.0	19.2	53.9	7.5	7.6	1.1	0.6
$30,000-39,999	6.3	14.1	61.8	7.6	9.4	0.7	--
$40,000 & over	4.9	26.0	59.2	4.1	2.6	2.5	0.8
By Region							
Northeast	8.4	15.7	46.7	8.6	13.4	6.0	1.1
North Central	4.3	13.7	55.0	11.2	10.9	4.1	0.9
South	11.0	11.9	54.4	8.6	10.7	2.2	1.2
West	8.5	13.9	52.0	7.8	10.7	5.6	1.5

The following information on purchase of men's sportswear for men aged 17 and older for the years 1983 and 1982 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. The information is based on findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

CONSUMER BUYING HABITS

Slacks

Purchases of men's corduroy slacks fell 5.2% in dollars and 6.0% in units between 1982 and 1983, according to NPD panel members. Non-corduroy slack purchases were off 2.9% in dollars and 1.7% in quantity during the same period.

Purchases of Men's Slacks by Store Type, 1982, 1983

	Corduroy Slacks				Non-corduroy Slacks			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	28.7	22.3	35.5	27.8	34.4	36.3	36.7	38.1
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	27.0	32.5	23.6	26.9	25.5	20.6	22.1	18.1
Discount stores	15.1	12.4	11.8	9.4	12.4	12.4	9.8	10.0
Specialty stores	16.8	23.1	17.8	26.5	17.1	21.2	22.5	26.1
All other outlets	11.3	8.2	10.2	8.0	9.8	8.4	8.2	6.7
No answer	1.1	1.5	1.0	1.4	0.8	1.0	0.8	1.0

Purchases of Men's Slacks by Price Points, 1982, 1983

	Corduroy Slacks				Non-corduroy Slacks			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $14.00	39.0	41.7	24.3	25.6	31.7	34.8	17.2	17.5
$14.00 - $19.99	32.8	39.7	31.5	42.8	36.1	34.4	33.5	33.5
$20.00 & over	28.1	18.6	44.2	31.6	32.2	30.8	49.3	49.0

Purchases of Men's Slacks by Fiber, 1982, 1983

	Percent of Units		Percent of Dollars	
	1983	1982	1983	1982
	Corduroy Slacks			
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	75.3	75.4	75.7	73.4
100% cotton	14.9	17.2	15.3	19.9
All other fibers	3.8	2.9	3.6	2.3
No answer	6.0	4.5	5.4	4.4
	Non-corduroy Slacks			
Total	100.0	100.0	100.0	100.0
100% polyester	38.0	42.3	34.9	40.0
Polyester/cotton	34.1	32.2	30.7	28.0
Other polyester blends	14.0	11.4	15.8	13.5
100% cotton & cotton blends	4.3	4.7	4.0	4.2
All other fibers	4.0	3.6	7.8	7.3
No answer	5.6	5.8	6.8	7.0

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Jeans

Among NPD member households, denim jean purchases declined 2.6% in terms of dollars and 2.4% in units. Dollar sales of men's corduroy jeans in 1983 dropped 19.4% from 1982 on a 14.3% reduction in unit sales. Other types of men's jeans were off 9.3% in dollars, with unit sales down 14.3%.

Purchases of Men's Jeans by Store Type, 1982, 1983

	Denim Jeans		Corduroy Jeans		Other Men's Jeans	
	1983	1982	1983	1982	1983	1982
			Percent of Units			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	21.7	22.0	20.3	26.2	24.1	21.8
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	30.5	27.5	25.8	27.7	29.6	34.7
Discount stores	16.5	17.1	15.8	10.4	15.9	11.7
Specialty stores	17.2	20.7	27.4	26.9	18.6	16.7
All other outlets	12.2	11.0	10.1	8.0	11.0	12.1
No answer	1.8	1.6	0.6	0.8	0.6	3.0
			Percent of Dollars			
Total	100.0	100.0	100.0	100.0	100.0	100.0
Department stores	23.8	25.2	21.1	29.3	25.6	23.0
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	28.2	24.5	25.2	24.1	29.2	31.7
Discount stores	14.7	14.8	14.2	9.8	13.0	9.2
Specialty stores	19.9	23.8	28.3	28.1	20.6	23.2
All other outlets	11.5	10.0	10.5	7.9	11.1	9.6
No answer	2.0	1.6	0.7	0.8	0.4	3.2

Purchases of Men's Jeans by Price Points, 1982, 1983

	Denim Jeans		Corduroy Jeans		Other Men's Jeans	
	1983	1982	1983	1982	1983	1982
			Percent of Units			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $14.00	48.1	50.4	52.1	44.2	39.6	47.7
$14.00 - $19.99	41.1	37.3	41.5	45.7	37.2	35.0
$ 20.00 & over	10.8	12.3	6.4	10.1	23.2	17.3
			Percent of Dollars			
Total	100.0	100.0	100.0	100.0	100.0	100.0
Less than $14.00	34.9	35.3	37.9	31.6	25.7	30.4
$14.00 - $19.99	46.6	42.8	50.7	51.9	38.8	39.4
$20.00 & over	18.5	21.8	11.3	16.5	35.5	30.2

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Jeans

Purchases of Men's Jeans by Months, 1982, 1983

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
% of Units:													
Denim jeans													
1983	5.6%	5.5%	7.7%	6.6%	6.2%	8.7%	7.1%	9.9%	6.8%	9.4%	11.2%	15.3%	100.0%
1982	5.0	5.4	7.7	7.4	6.0	7.2	8.3	13.6	6.9	6.2	11.4	15.0	100.0
Corduroy jeans													
1983	6.0	6.7	1.9	3.4	1.1	2.5	2.0	10.2	8.0	12.5	15.0	30.6	100.0
1982	6.8	8.7	4.3	2.8	0.7	2.4	5.0	11.8	13.3	13.4	12.4	20.4	100.0
Other jeans													
1983	7.8	4.4	9.3	9.5	8.3	9.8	8.1	8.7	7.0	4.8	7.2	15.1	100.0
1982	5.6	5.7	8.7	12.8	8.8	16.1	5.6	5.7	6.5	7.2	8.9	8.3	100.0
% of Dollars:													
Denim jeans													
1983	5.5	5.3	7.8	6.6	6.4	8.7	7.3	9.5	6.6	9.2	10.7	16.4	100.0
1982	4.9	5.0	7.7	7.6	6.2	8.1	7.8	12.0	7.1	6.4	11.3	15.9	100.0
Corduroy													
1983	5.7	4.6	1.4	4.2	1.3	2.9	1.8	9.0	4.9	11.7	16.0	36.3	100.0
1982	5.9	6.9	4.2	2.6	0.5	2.8	5.0	12.3	10.2	13.4	14.2	21.9	100.0
Other jeans													
1983	7.4	4.6	10.5	8.6	7.8	10.7	8.2	8.6	6.3	5.9	7.3	14.1	100.0
1982	5.1	5.7	9.0	15.5	7.8	15.3	5.5	6.2	6.4	6.7	8.0	8.7	100.0

Purchases of Men's Jeans by Fibers, 1982, 1983

	Denim Jeans				Corduroy Jeans			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	21.2	29.0	22.0	26.7	73.7	76.4	72.3	77.5
100% cotton	73.3	61.6	72.0	62.9	17.0	14.4	17.9	15.5
All other fibers	1.7	4.5	1.8	5.8	5.2	5.5	4.8	4.2
No answer	3.8	4.8	4.1	4.7	4.1	3.7	5.0	2.8

	Other Men's Jeans			
	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	7.4	12.3	9.2	12.8
Polyester/cotton blend	45.6	52.1	45.0	50.0
100% cotton	38.8	26.6	36.0	28.9
All other fibers	2.1	5.8	2.9	4.8
No answer	6.2	3.1	6.8	3.5

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Active Sportswear - Swimwear

As reported by NPD, men's swimwear sales in 1983 dipped 7.1% in dollars and 8.7% in the quantity purchased compared with 1982.

Purchases of Men's Swimwear by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	30.7	24.7	36.3	30.5
Mass merchandisers (Sears/Penneys/Wards/K-mart)	25.3	30.3	23.3	28.7
Discount stores	17.9	16.0	13.6	10.2
Specialty stores	10.6	15.0	12.2	17.6
All other outlets	15.1	11.9	14.2	11.3
No answer	0.4	2.0	0.4	1.7

Purchases of Men's Swimwear by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.00	26.9	41.8	13.3	22.4
$7.00 - $10.99	42.2	24.1	38.9	20.4
$11.00 & over	30.9	34.2	47.8	55.2

Purchases of Men's Swimwear by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	69.7	67.2	71.9	68.2
100% polyester & other polyester	6.4	3.1	6.2	3.7
100% nylon and nylon blends	11.9	14.7	11.4	14.7
100% cotton & cotton blends	5.7	6.6	4.6	5.6
All other fibers	2.2	1.1	2.1	2.0
No answer	4.1	7.3	3.7	5.8

Purchases of Men's Swimwear by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	3.4%	3.7%	4.4%	5.5%	17.2%	27.2%	19.5%	12.8%	2.8%	1.8%	1.3%	0.4%	100.0%
1982	1.8	4.0	7.4	6.2	14.6	27.5	25.9	5.8	3.9	0.3	0.4	2.1	100.0
Dollars:													
1983	3.3	5.8	4.3	5.5	16.3	28.2	16.3	14.2	2.7	1.3	1.9	0.1	100.0
1982	2.5	5.9	6.1	6.8	17.6	31.8	18.2	6.5	2.2	0.4	0.02	1.8	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Sweatshirts

NPD member households reported purchasing 25.7% more sweatshirts in 1983 than the prior year. These sweatshirts had a total retail value 32% higher than in 1982.

Purchases of Men's Sweatshirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	16.5	14.7	19.5	15.1
Mass merchandisers (Sears/Penneys/Wards/K-mart)	32.5	41.1	31.6	41.7
Discount stores	26.7	20.3	22.1	18.3
Specialty stores	9.3	11.1	12.1	12.7
All other outlets	14.6	10.8	14.4	10.7
No answer	0.4	2.0	0.4	1.4

Purchases of Men's Sweatshirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.00	35.6	40.6	18.2	21.3
$7.00 - $10.99	34.9	32.8	33.3	32.6
$11.00 & over	29.6	26.6	48.4	46.1

Purchases of Men's Sweatshirts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester & polyester blends	30.0	35.9	34.9	40.1
100% acrylic	10.3	12.5	9.8	13.5
Acrylic blends	46.0	34.0	41.3	29.4
100% cotton & cotton blends	8.2	11.3	8.0	9.7
All other fibers	1.8	3.0	3.0	3.5
No answer	3.6	3.2	2.9	3.8

Purchases of Men's Sweatshirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	7.8%	5.3%	4.8%	4.6%	2.8%	2.1%	2.5%	4.0%	5.6%	11.2%	18.6%	30.7%	100.0%
1982	6.4	8.0	6.6	3.5	2.8	3.0	4.4	4.3	4.7	10.2	17.1	29.0	100.0
Dollars:													
1983	6.3	3.9	4.7	3.4	2.6	2.3	2.0	3.8	5.1	11.6	19.6	34.7	100.0
1982	6.1	5.3	5.3	2.6	2.8	2.5	3.7	3.8	4.8	8.6	19.2	35.2	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Polo Shirts

Purchases of men's polo shirts by NPD panelists in 1983 exceeded 1982 in dollars spent by 5.6% but the number purchased remained virtually unchanged.

Purchases of Men's Polo Shirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	26.3	23.5	32.7	30.1
Mass merchandisers (Sears/Penneys/Wards/K-mart)	29.5	31.5	26.0	28.2
Discount stores	17.0	18.9	13.2	13.7
Specialty stores	13.0	14.3	15.2	17.3
All other outlets	12.9	11.0	11.7	9.8
No answer	1.2	0.7	1.1	0.8

Purchases of Men's Polo Shirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $8.00	45.0	49.3	22.2	26.6
$8.00-$15.99	40.0	38.5	46.5	46.3
$16.00 & over	15.0	12.2	31.2	27.1

Purchases of Men's Polo Shirts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	68.9	62.5	65.6	61.0
100% cotton	17.3	13.3	20.0	15.9
100% polyester	4.7	11.2	4.7	10.4
100% acrylic & acrylic blends	3.4	4.3	4.3	4.7
All other fibers	2.3	5.1	2.1	4.4
No answer	3.3	3.5	3.6	3.6

Purchases of Men's Polo Shirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	3.5%	4.2%	7.1%	5.6%	10.2%	17.0%	13.4%	10.3%	4.7%	4.0%	7.3%	12.8%	100.0%
1982	4.8	5.0	7.1	7.5	11.6	14.5	11.3	10.8	5.8	4.1	6.9	10.5	100.0
Dollars:													
1983	3.2	3.3	7.6	5.9	9.7	15.9	10.3	9.3	4.8	4.3	8.3	17.2	100.0
1982	4.7	4.2	6.7	7.6	10.7	14.5	10.0	10.0	6.1	4.3	8.1	13.1	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Sweatshirts, Joggers & Jumpsuits

NPD panel purchases in this activewear category were off 21.0% in 1983 compared with the previous year, but the amount spent on sweatpants, joggers and jumpsuits declined by 1.5% over the same period.

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	11.1	20.1	9.3	26.2
Mass merchandisers (Sears/Penneys/Wards/K-mart)	53.9	36.9	39.9	36.4
Discount stores	9.0	35.6	5.3	26.6
Specialty stores	20.8	4.2	42.6	5.6
All other outlets	5.3	3.2	2.8	5.3

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $14.00	16.0	34.3	5.0	14.2
$14.00 - $19.99	39.8	28.6	27.8	25.2
$20.00 & over	44.1	37.0	67.2	60.6

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Fibers, 1982

	1982	
	Units	Dollars
Total	100.0%	100.0%
Polyester/cotton blend	74.9	71.0
100% polyester & other polyester blends	9.8	11.8
100% cotton	15.2	17.3

NOTE: 1983 data by fiber not shown due to a significant percentage of non-responses.

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Shorts

In dollars, men's short sales slid 12.5% in 1983, in quantity, sales were 9.5% under the 1982 level, according to NPD.

Purchases of Men's Shorts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	25.2	24.2	29.6	29.5
Mass merchandisers (Sears/Penneys/Wards/K-mart)	29.1	32.5	26.3	28.8
Discount stores	20.8	18.6	15.4	13.2
Specialty stores	10.6	10.8	14.0	13.9
All other outlets	13.6	13.1	13.8	13.4
No answer	0.7	0.9	0.9	1.2

Purchases of Men's Shorts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $6.00	31.6	33.7	13.8	14.6
$6.00 - $11.99	46.1	45.4	46.0	46.7
$12.00 & over	22.3	20.9	40.1	38.7

Purchases of Men's Shorts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	6.7	8.1	5.2	7.8
Polyester/cotton blend	68.7	67.7	69.1	67.5
100% cotton	11.1	13.5	13.6	12.7
100% nylon & nylon blends	2.5	1.9	2.5	2.1
100% acrylic & acrylic blends	5.6	3.6	3.5	3.4
All other fibers	1.7	1.4	1.7	1.4
No answer	3.8	3.8	4.4	5.0

Purchases of Men's Shorts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.7%	3.1%	6.2%	8.0%	14.6%	27.9%	18.0%	9.8%	4.1%	1.9%	2.2%	2.6%	100.0%
1982	2.2	4.2	6.0	7.5	16.4	20.6	20.4	11.2	3.7	1.6	1.9	4.0	100.0
Dollars:													
1983	1.1	2.9	6.8	8.2	14.9	29.6	16.9	8.9	3.8	2.1	1.7	3.1	100.0
1982	1.8	3.3	6.7	8.4	15.7	22.9	20.1	11.1	2.6	1.9	1.9	3.6	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Sport Shirts

Men's sport shirt sales made by NPD panelists in 1983 were below the previous year in dollars, spent by 3.5% and 5.3% in quantity purchased.

Purchases of Men's Sport Shirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	23.8	26.6	28.4	31.1
Mass merchandisers (Sears/Penneys/Wards/K-mart)	34.3	35.4	30.1	29.5
Discount stores	19.8	16.4	14.9	13.3
Specialty stores	12.7	12.3	16.5	16.5
All other outlets	8.7	8.5	9.2	8.9
No answer	0.7	0.8	0.9	0.7

Purchases of Men's Sport Shirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $8.00	43.1	45.3	22.5	23.9
$8.00 - $15.99	42.1	40.5	47.2	46.9
$16.00 & over	14.8	14.1	30.3	29.2

Purchases of Men's Sport Shirts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blends	58.5	55.0	58.3	54.1
100% cotton	26.0	26.8	24.8	25.3
100% acrylic & acrylic blends	3.1	3.4	3.4	3.5
100% polyester	4.2	5.8	3.4	5.2
All other fibers	5.1	6.0	7.0	8.4
No answer	3.1	3.0	3.1	3.5

Purchases of Men's Sport Shirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	6.4%	4.9%	5.6%	5.8%	5.5%	10.4%	7.0%	6.2%	5.7%	8.1%	13.8%	20.6%	100.0%
1982	6.6	5.2	4.7	5.5	5.1	7.8	7.3	6.2	6.4	8.8	14.8	21.7	100.0
Dollars:													
1983	5.4	4.6	5.0	6.0	5.7	9.7	6.2	6.3	5.3	8.6	13.7	23.5	100.0
1982	6.3	4.6	4.3	5.5	5.5	7.5	6.3	5.9	5.5	8.5	15.4	24.5	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Sweaters

Dollar sales of men's sweaters fell 8.9% in 1983 compared with 1982 as the number of sweaters purchased by households included in the NPD survey dropped 2.5%.

Purchases of Men's Sweaters by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	33.4	36.5	37.0	40.0
Mass merchandisers (Sears/Penneys/Wards/K-mart)	21.5	21.7	18.0	17.8
Discount stores	16.6	15.1	12.1	10.8
Specialty stores	17.3	17.1	22.4	21.8
All other outlets	9.9	8.4	9.2	8.1
No answer	1.3	1.3	1.3	1.6

Purchases of Men's Sweaters by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $12.00	34.5	36.6	16.8	18.8
$12.00 - $19.99	38.4	39.9	36.1	39.9
$20.00 & over	27.1	23.5	47.1	41.4

Purchases of Men's Sweaters by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester & polyester blends	6.5	8.5	6.0	7.5
100% cotton & cotton blends	3.7	2.3	4.3	1.9
100% wool & wool blends	24.5	20.1	30.9	27.4
100% acrylic	47.8	53.6	40.2	48.2
Acrylic blends	9.8	7.1	9.1	6.2
All other fibers	1.7	2.6	3.4	2.6
No answer	6.0	5.7	6.1	6.2

Purchases of Men's Sweaters by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	8.9%	6.0%	3.6%	1.9%	1.0%	1.1%	1.0%	3.4%	4.6%	9.7%	19.8%	39.0%	100.0%
1982	6.9	6.8	3.0	1.5	0.5	1.7	1.8	3.4	4.5	9.7	23.0	37.1	100.0
Dollars													
1983	7.2	4.4	3.0	1.1	1.2	1.1	1.0	2.9	4.9	10.0	19.7	43.3	100.0
1982	6.9	5.7	1.9	1.9	0.2	1.1	1.3	3.3	3.9	9.6	23.1	40.9	100.0

Source: NPD Special Industry Services.

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COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00) (1983 Edition available now -- 1984 Edition will be available in July, 1984)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

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INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR. Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

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TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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(Men's, Women's, Boys' and Girls')

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FOOTWEAR (MEN'S, WOMEN'S, BOYS' & GIRLS')

Market Trends

While the domestic footwear industry appears to be losing the battle against imports, consumption of footwear by U.S. consumers has continued to rise at a strong pace. According to the U.S. Bureau of Industrial Economics, per capita purchases in 1983 increased for the second consecutive year, reaching 3.7 pairs, up from a low of 3.22 pairs in 1981.

Personal consumption expenditures for footwear in 1983 were valued at $21.6 billion, up 6.3% over the 1982 total. Retail prices, on the other hand, leveled off, with the Consumer Price Index for footwear averaging a gain of less than 1% compared with 1982.

Large manufacturers have been able to improve their profitability by diversifying into general and specialty retailing, and importing footwear, sourcing on a global scale. Major efforts have also been made to improve productivity and lower labor costs within domestic plants.

Nevertheless, the long-term prospects for the U.S. manufacturer remain poor. The U.S. Bureau of Industrial Economics projects a compound annual rate of decline of about 2%, in constant dollars, to 1988. Although per capita consumption will reach higher levels as the economy prospers, the growth will be filled by imports. Government action to stem the tide appears unlikely.

While the application of new technology, especially robotics, can be utilized by large, well-capitalized companies to narrow differences in labor costs between the U.S. and foreign producers, this technology will also be adopted by overseas competitors. Further consolidation and concentration of manufacturing companies in the U.S. footwear industry seems inevitable.

The fast growth in the market for athletic footwear has leveled off, and consumers have turned their attention to an increasing extent to "athleisure" footwear--footwear with an active look plus fashion features--also known as "street active." This type of footwear is becoming a major product of athletic footwear producers as well as some activewear manufacturers.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census compiles a complete census of U.S. manufactures every five years, 1977 being the latest data currently available. (Preliminary findings from the 1982 census should be released later this year). Between censuses the bureau conducts annual surveys among a representative sample of manufacturers which are the basis for estimates on key measures of manufacturing activity for industry groups. These estimates provide a continuous series of basis industry statistics, now available through 1981.

In addition, the Bureau of Industrial Economics (Department of Commerce) publishes an annual edition of U.S. Industrial Outlook. This includes estimates on footwear industry trends, updating Census Bureau data. Information from this source will be found following the next table which is based on Census Bureau reports.

GENERAL INDUSTRY STATISTICS

The U.S. Manufacturing Industry by Type of Footwear, 1977, 1980, 1981

	1981	1980	1977	% Change 1981/1980
NONRUBBER FOOTWEAR, TOTAL (SIC 314)				
Number of companies	na	na	541	--
Number of establishments#	700	710	811	--
With 20 or more employees#	547	562	603	--
Payroll (mil. $)	$1,314.9	$1,203.7	$1,031.5	+ 9.2%
Value added by manufacture (mil. $)**	2,987.5	2,745.3	2,069.4	+ 8.8
Value of industry shipments (mil. $)***	5,496.3	5,106.9	3,891.7	+ 7.6
Capital expenditures, new (mil. $)	104.1	67.9	37.1	+ 53.3
MEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3143*)				
Number of companies	na	na	115	--
Number of establishments#	na	207	213	--
With 20 or more employees#	na	176	180	--
Payroll (mil. $)	$ 518.1	$ 441.6	$ 417.0	+ 17.3%
Value added by manufacturer (mil. $)**	1,280.3	1,084.7	871.9	+ 18.0
Value of industry shipments (mil. $)***	2,458.5	2,149.0	1,734.5	+ 14.4
Capital expenditures, new (mil. $)	47.4	22.9	14.5	+107.0
WOMEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3144*)				
Number of companies	na	na	243	--
Number of establishments#	na	248	328	--
With 20 or more employees#	na	214	241	--
Payroll (mil. $)	$ 494.7	$ 453.4	$ 388.6	+ 9.1%
Value added by manufacturer (mil. $)**	1,086.8	955.1	755.0	+ 13.8
Value of industry shipments (mil. $)***	1,913.8	1,733.5	1,361.2	+ 10.4
Capital expenditures, new (mil. $)	29.4	20.0	9.7	+ 47.0
HOUSE SLIPPERS (SIC 3142*)				
Number of companies	na	na	65	--
Number of establishments#	na	68	78	--
With 20 or more employees#	na	48	55	--
All employees (thous.)	8.8	9.2	8.1	- 4.3%
Production workers (thous.)	7.5	7.7	7.0	- 2.6
Payroll (mil. $)	$ 75.9	$ 74.0	$ 54.5	+ 2.6
Value added by manufacture (mil. $)**	149.4	190.9	108.8	- 21.7
Value of industry shipments (mil. $)***	268.2	323.1	201.2	- 17.0
Capital expenditures, new (mil. $)	3.5	2.3	2.3	+ 52.2

(continued)

GENERAL INDUSTRY STATISTICS

The U.S. Manufacturing Industry by Type of Footwear, 1977, 1980, 1981
(continued)

	1981	1980	1977	% Change 1981/1980
FOOTWEAR, EXCEPT RUBBER, NOT ELSEWHERE CLASSIFIED (SIC 3149*)				
Number of companies	na	na	159	--
Number of establishments#	na	164	192	--
With 20 or more employees	na	119	127	--
All employees (thous.)	23.4	26.6	24.8	- 12.0%
Production workers (thous.)	20.4	23.3	21.8	- 12.4
Payroll (mil. $)	$ 226.2	$ 234.7	$171.4	- 3.6
Value added by manufacture (mil. $)**	471.1	514.7	333.4	- 8.5
Value of industry shipments (mil. $)***	855.7	901.3	594.8	- 5.1
Capital expenditures, new (mil. $)	23.8	21.3	10.6	+ 11.7
RUBBER & PLASTICS FOOTWEAR (SIC 302*)				
Number of companies	na	na	67	--
Number of establishments#	na	68	84	--
With 20 or more employees	na	44	50	--
Payroll (mil. $)	$ 147.3	$ 174.3	$ 159.1	- 15.4%
Value added by manufacture (mil. $)**	360.1	307.7	272.3	+ 17.0
Value of industry shipments (mil. $)***	707.3	590.8	517.0	+ 19.7
Capital expenditures, new (mil. $)	14.9	12.5	11.3	+ 19.2
BOOT & SHOE CUT STOCK & FINDINGS (SIC 3131*)				
Number of companies	na	na	174	--
Number of establishments#	na	175	190	--
With 20 or more employees	na	96	96	--
All employees (thous.)	9.8	10.0	8.5	- 2.0%
Production workers (thous.)	8.4	8.7	7.4	- 3.4
Payroll (mil. $)	$ 105.5	$ 93.1	$ 65.3	+ 13.3
Value added by manufacture (mil. $)**	219.6	196.3	109.4	+ 11.9
Value of industry shipments (mil. $)***	488.4	431.5	270.6	+ 13.2
Capital expenditures, new (mil. $)	8.4	6.3	3.0	+ 33.3

na = not available

# Each business location is counted as a separate establishment. Figures for 1980 and 1981 are from the U.S. Bureau of the Census, County Business Patterns.

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) System determined by the principal product manufactured, as shown below. (SIC 314 is a composite of industries in 3142, 3143, 3144)

SIC 3143 comprises establishments primarily engaged in the production of men's dress and casual shoes, boots and work shoes. Footwear produced in this industry is primarily of leather.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

(Footnotes continued)

SIC 3144 comprises establishments primarily engaged in the production of women's dress and casual shoes, sandals and boots. Footwear produced in this industry is primarily of leather.

SIC 3142 comprises establishments primarily engaged in the production of house slippers of leather or other materials. Slipper socks are included in this industry.

SIC 3149 comprises establishments primarily producing footwear not classified in the above industries or in SIC 3021 (rubber and plastic). Included in SIC 3149 are shoes for infants and babies, children, misses, youths and boys. Also included are all athletic shoes, theatrical shoes, and beach slippers.

SIC 302 comprises establishments primarily engaged in manufacturing all-rubber and plastics footwear, waterproof fabric-upper footwear having rubber or plastic soles vulcanized to the uppers. There are two segments in this industry, (1) protective footwear, such as hunting boots, galoshes and overshoes; and (2) rubber-soled fabric upper footwear, such as athletic footwear, sneakers, sport oxfords and specialties designed for leisure wear.

SIC 3131 comprises establishments primarily engaged in manufacturing leather soles, inner soles, and other boot and shoe cut stock findings. This industry also includes finished wood heels. It does not include manufacturers of shoe findings made of rubber, plastic, or fiber.

**Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

***Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products, as well as miscellaneous receipts for contract work, resales, etc. This value should be clearly distinguished from the total value of footwear made by all producers, including those who make footwear as a seconary product and who are classified in other industries. This total product value is shown in the tables on pages 22 and 23.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Surveys of Manufactures; 1980, 1981.

GENERAL INDUSTRY STATISTICS

Explanation of other terms used in this Fact File:

> Nonrubber footwear: Includes shoes, boots and slippers made by "conventional" processes, such as cemented, welt, slip-lasted, etc., and shoes with rubber sole vulcanized to leather uppers. (Footwear covered in SIC 314)
>
> Rubber/plastic footwear: Footwear with rubber or plastic soles/fabric uppers and rubber or plastic protective footwear. (SIC 302)

The U.S. Bureau of Industrial Economics has estimated that there were some 300 U.S. companies producing nonrubber footwear as of 1982, operating 594 plants at the start of the year. During 1982, 10 factories started operations anew or under new management and 33 closed, lowering the net total to 571 by the end of the year. The number of factories in the nonrubber industry has steadily declined from a high of 990 in 1965. Plants producing rubber/plastics footwear numbered about 50 in 1982, according to the Bureau.

Estimated data for 1983 and projections for 1984 on a constant (1972) dollar basis were reported as follows:

Footwear Industry Trends & Projections, 1972-1983
(Millions of Dollars)

	1983	Compound Annual Growth Rate 1972-1983	Forecast 1984	% Change 1984/1983
Nonrubber footwear				
Industry shipments (current $)	$ 4,908	3.8	--	--
Industry shipments (1972 $)	2,345	- 3.0	$ 2,311	- 1.4%
Rubber/plastics footwear				
Industry shipments (current $)	705	1.5	--	--
Industry shipments (1972 $)	420	- 3.2	420	-0-

Source: U.S. Bureau of Industrial Economics, 1984 U.S. Industrial Outlook

Based on its annual Survey of Industrial & Commercial Buying Power, Sales & Marketing Management Magazine has compiled estimates on the number of establishments and value of industry shipments for major U.S. industries, including footwear, for the year 1983.

GENERAL INDUSTRY STATISTICS

Selected Footwear Industry Estimates, 1983

Industry Segments	Establishments Total*	Establishments Large**	Employment	Shipments Mil. $*	Shipments % In Large Estabs.**
Nonrubber					
Boot & shoe cut stock & findings	147	38	12,131	391.0	58%
House slippers	52	26	8,467	218.4	84
Men's footwear except athletic	178	142	56,200	2,063.8	97
Women's footwear except athletic	173	132	43,242	1,604.6	95
Other nonrubber footwear	189	126	42,697	711.5	92
Rubber/Plastic					
Rubber/plastic footwear (SIC 3021)	36	27	13,120	664.0	97

* Covers establishments with 20 or more employees.
**"Large" establishments are defined as those with 100 or more employees.

Source: Sales & Marketing Management
(April 23, 1984)

Employment & Earnings

Current information on employment and earnings by industry are compiled by the U.S. Bureau of Labor Statistics, Department of Labor. The data differ somewhat from employment figures compiled by the Census Bureau as a different procedure is used in compiling the figures.

BLS data indicate a steady decline in employment in the U.S. footwear industry. Preliminary figures for the month of February 1984 show total employment in the nonrubber footwear industry at 130,600, down 1.4% compared with the same month a year ago. Employment in men's nonrubber footwear was up slightly (+0.4%), while in the women's segment employment dropped 1.1%.

Footwear Industries of America reports that 19 factories were closed in the first five months of 1984 with a loss of 2,000 jobs; 17.3% of the nation's shoe workers were reported to be out of work in the first three months of the year.

For the year 1983, employment in the nonrubber footwear industry in the U.S. registered an average decline of 2.8% compared with 1982. Employment in the nonrubber footwear industry is now about half of its peak level reached in 1967.

The decline in 1983, however, was not as sharp as the dip in the recession year 1982. Total employment for that year was down 6.6% in nonrubber footwear and 7.5% in rubber/plastic footwear compared with 1981.

Employment in women's footwear held up better in 1983 than in men's. The total in the former dropped less than one percent, while employment in men's footwear declined 5.3%. In the rubber/plastics footwear industry, total employment in 1983 declined 3.6% compared with 1982, following a sharper drop (-10.2%) in 1982 compared with 1981.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Average hourly earnings in the footwear industry continued to gain in 1983. In the men's footwear industry, hourly earnings for production workers averaged $5.50 in 1983 compared with $5.35 the previous year; in the women's footwear segment, hourly earnings averaged $5.16 compared with $5.01 in 1982. In the rubber/plastics footwear industry, earnings in 1983 averaged $5.16 hourly, up from $5.13 in 1982, according to the Bureau of Labor Statistics.

Labor costs are cited as a prime factor in the inability of U.S. manufacturers of footwear to stem the tide of imports which now account for over 65% of total supply. The domestic industry is working hard to meet this competition by updating and improving plants, installing labor-saving machinery. An analysis by Value Line Inc. showed average labor costs in the industry now at 22% of average operating expenses, down from 29% a few years ago. Labor costs were reported to account for 23.8% of footwear factory prices, or average, in 1983.

Employment & Earnings in the U.S. Footwear Industry, 1981-1983

	Annual Average Employment (in Thousands)					
	Total Employees			Production Workers		
	1983	1982(r)	1981(r)	1983	1982	1981
Nonrubber footwear, total*	132.8	136.8	146.4	113.2	116.5	125.9
Men's, except athletic	52.2	55.1	59.6	42.2	45.5	51.1
Women's, except athletic	52.1	52.5	54.7	46.2	45.8	47.0
Rubber/plastics footwear	18.6	19.3	21.5	15.7	16.7	19.0

	Production Workers					
	Avg. Weekly Hours			Avg. Weekly Earnings ($)		
	1983	1982(r)	1981(r)	1983	1982(r)	1981(r)
Nonrubber footwear, total*	36.2	35.1	36.3	190.77	179.71	174.97
Men's, except athletic	36.8	35.3	37.4	202.40	188.86	189.24
Women's, except athletic	35.9	34.8	35.3	185.24	174.35	165.20
Rubber/plastics footwear	38.1	40.0	41.3	196.90	193.91	178.40

(r) = revised
* Includes infants', children's, youths' & athletic footwear not separately shown.

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Employment & Earnings.

GENERAL INDUSTRY STATISTICS

Selected Data on Employment & Earnings in the Footwear Industry

	1983(p)	1982	1981
All employees	132,800	136,800	146,400
Women employees	87,200	90,400	96,600
Production workers	113,100	116,500	125,900
Gross average hourly earnings	$ 5.27	$ 5.12	$ 4.82
Productivity: pair produced per hour	1.67	1.67	1.62
Unit labor cost	3.16	3.06	2.97
Share of average price accounted for by labor	23.8%	23.3%	23.1%

(p) preliminary

Source: U.S. Bureau of Labor Statistics & Footwear Industries of America.

Industry Concentration/Plant Closings

The footwear industry is composed primarily of a large number of privately-owned companies. According to the Bureau of Industrial Economics 70% of the producers of nonrubber footwear make under one million pairs annually. These producers account for only about 17% of total production. Twenty producers, each with annual production of more than three million pairs, are said to account for over 50% of total nonrubber footwear production. In 1969 manufacturers of this size accounted for only 37% of the total output.

The trend toward greater concentration of footwear production among large companies able to withstand the competition of imports is expected to continue. The strongest companies have started or expanded their own importing operations, while weaker companies have closed plants or gone out of business.

Concentration of the footwear industry based on employment size has been reported by the U.S. Bureau of the Census for 1981 as noted below.

Distribution of Footwear Manufacturing Establishments & Total Employees By Employment Size Classification, 1981

	Establishments		Total Employees	
	Number	%	Number	%
Nonrubber footwear industry	700	100.0	130,467	100.0
Employment size classification:				
Under 10	107	15.3	340	0.3
10 to 49	135	19.3	3,859	3.0
50 to 99	77	11.0	5,806	4.4
100 to 249	169	24.1	30,782	23.6
250 to 499	175	25.0	61,400	47.1
500 to 999	30	4.3	28,280	21.6
1,000+	7	1.0		

(continued)

Distribution of Footwear Manufacturing Establishments & Total Employees By Employment Size Classification, 1981

(continued)

	Establishments		Total Employees	
	Number	%	Number	%
Rubber/plastics footwear industry	69	100.0	20,290	100.0%
Employment size classification:				
Under 50	32	46.4	na	--
50 to 99	6	8.7	540	2.7
100 to 249	11	15.9	na	--
250 to 499	10	14.5	3,968	19.6
500 to 999	3	4.3	1,958	9.6
1,000+	7	10.1	11,817	58.2

na = not available

Source: U.S. Bureau of the Census, County Business Patterns, 1981

According to data compiled by Footwear Industries of America, a net total of 234 footwear manufacturing plants were closed in the U.S. in the 1972-1982 period. Closings have continued to outnumber plant openings in 1983-1984.

Nonrubber Footwear Plant Closings & Openings, 1972-1982

	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982
Plant closings	66	61	76	61	30	39	34	52	26	38	33
Plant openings	29	33	32	17	28	27	44	23	10	19	10
Net openings or (closings)	(37)	(18)	(44)	(44)	(2)	(12)	10	(29)	(16)	(19)	(23)

Source: Footwear Industries of America

Location of the Industry

According to Census Bureau data for the year 1980, the footwear industry was concentrated in five states, each of which had over 10,000 employees in nonrubber footwear manufacturing plants: Maine (12.7% of the U.S. total), Missouri (11.7%), Tennessee (10.1%), Pennsylvania (8.3%), Massachusetts (8.6%).

The New England States, which accounted for 23.7% of nonrubber footwear production in 1982, were reported to account for 27.4% of industry employment and 29.1% of payrolls as of 1980.

GENERAL INDUSTRY STATISTICS

Location of the Industry

Regional Distribution of Employment & Payrolls
In The Nonrubber Footwear Industry, 1980

	Employment	Payrolls
Total	126,052	$1,146,495
	100.0%	100.0%
New England	27.4	29.1
Middle Atlantic	14.5	14.8
North Central Region	23.3	24.2
South & West	34.1	31.3
Geographic area not specified*	0.7	0.6

* Represents estimated data for establishments of small companies, typically those with fewer than five employees, that were not included in the Census Bureau mailing panel.

Source: Current Industrial Reports, MA-31A,
U.S. Bureau of the Census.

Over 300 plants have closed in the past 10 years, according to Footwear Industries of America. In 1972-1982, shutdowns in major shoe states were reported as follows: Maine 52, Massachusetts 55, New Hampshire 40, Pennsylvania 63, New York 44, Illinois 12, Ohio 8, Missouri 30, Wisconsin 24, Arkansas 13, Tennessee 17.

In view of the decision of the International Trade Commission not to apply restraints to the quantity of shoes imported into the U.S., a number of plants have announced plans to go out of business.

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Operating profits for fiscal 1983 reported for the 10 leading footwear manufacturing companies in the U.S., and related data are summarized below. Composite sales of footwear by the 10 leaders amounted to over $3.5 billion, representing an 8.5% gain over the comparable 1982 total, measured in current dollars.

Sales & Profits of Leading Publicly-Held Footwear Manufacturers,
1982, 1983

	Footwear Sales (Mil. $)		Footwear Operating Profit (Mil. $)		Footwear's % Contribution To Total Company: Sales		Footwear's % Contribution To Total Company: Operating Profit	
	1983	1982	1983	1982	1983	1982	1983	1982
U.S. Shoe Corp.	$ 741.9	$ 670.9	$ 85.1	$ 72.0	49%	53%	52%	55%
Nike, Inc.	666.5	580.3	nr	nr	77	89	nr	nr
Interco, Inc.	565.9	546.0	58.5	57.1	21	21	24	28

(continued)

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Sales & Profits of Leading Publicly-Held Footwear Manufacturers, 1982, 1983
(continued)

	Footwear Sales (Mil. $)		Footwear Operating Profit (Mil. $)		Footwear's % Contribution to Total Company: Sales		Footwear's % Contribution to Total Company: Operating Profit	
	1983	1982	1983	1982	1983	1982	1983	1982
Genesco, Inc.	$448.2	$451.4	$ 17.4	$ 14.9	70%	68%	73%	52%
Wolverine World Wide*	353.1	294.6	25.2	24.6	nr	nr	nr	nr
Stride Rite Corp.	301.7	224.8	30.2	22.5	100	100	100	100
Chesebrough-Pond's, Inc. (G.H. Bass & Co.)	143.8	140.2	5.3	17.8	8	9	2	8
Suave Shoe Corp.	111.5	121.9	4.1	12.7	nr	nr	nr	nr
Weyenberg Manufacturing	103.6	97.5	6.9	6.4	100	100	100	100
R.G. Barry Corp.	102.7	134.0	3.1	4.2	100	100	100	100

NOTE: Footwear sales and operating profit include both manufacturing and retailing operations, where applicable.

nr = not reported.

*Figures are total company sales of continuing operations only.

Source: Fairchild Market Research Division
based on annual reports.

Profit and loss data for the footwear industry, compiled by Kurt Salmon Associates, showed the improvement in market conditions in 1983 compared with the deep recession year 1982. Net income in the industry reached 4.72% of net sales, up from 3.53% the previous year, and was the best performance in recent years.

U.S. Footwear Industry Profit & Loss, 1979-1983
(Fiscal Periods)

	1983	1982	1981	1980	1979
Reported net sales (000)	$4,216.3	$3,729.8	$3,325.8	$2,770.1	$2,234.8
Net sales - %	100.00	100.00	100.00	100.00	100.00
- Cost of goods sold	65.32	66.54	66.58	66.31	66.37
Gross profit	34.68	34.46	33.42	33.69	33.63
- Sell, gen., admin. exp.	24.55	24.39	24.29	24.80	24.88
Operating earnings	10.13	9.08	9.13	8.89	8.74
- Interest expense	1.52	1.84	1.71	1.50	1.31
Misc. income or expense	0.26	- 0.72	0.29	0.15	0.15
Income before tax	8.87	6.52	7.71	7.54	7.59
- Income tax	4.16	3.00	3.41	3.45	3.61
Income after tax	4.71	3.53	4.30	4.08	3.98
Extraordinary item	0.01	0.00	0.01	0.00	0.05
Net income	4.72	3.53	4.31	4.09	4.04

Source: Kurt Salmon Associates

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Domestic shoe companies (manufacturers and importers) showed a pretax profit of 7.5% on their U.S. operations in 1983, according to findings in a survey conducted by the International Trade Commission (ITC) in preparation for hearings on Section 201 (pertaining to protection from imports). This compares with the 6.9% profit margin posted in 1982, 8.3% in 1981, 8.1% in 1980 and 6.2% in survey findings for 1979.

The validity of the 1983 findings, however, has been questioned by industry spokesmen, who have pointed out that of the 91 responding firms, 54 (59.3%) produced under 1 million pairs of nonrubber footwear per year; 27 firms (40.7%) produced 1 million or more. Industry-wide figures, however, indicate that about 70% of the industry's firms produce under 1 million pairs. A more-representative sample, according to critics, would have produced a lower profit average.

In May 1982 the Bureau of Economics, Federal Trade Commission, released an Annual Line of Business Report covering financial ratios of industries in the U.S., including the footwear industry, in 1976.

Selected Operating Ratios in the U.S. Footwear Industry, 1976

Ratio	Rubber/Plastic Footwear		Nonrubber Footwear		Av. For All Mfg. Industries
	%	Rank	%	Rank	%
Operating income to assets	2.0	225	13.5	115	12.3
Operating income to sales	1.6	223	6.9	151	7.7
Media advertising expense to sales	2.8	43	1.4	72	1.2
Total selling expense to sales	19.5	21	9.5	86	6.6
Company financed R&D to sales	0.7	131	0.2	193	1.7
Total assets to sales	76.6	56	50.8	194	--

Source: Federal Trade Commission, Statistical Report: Annual Line of Business Report, 1976

Advertising Expenditures

Management consultants Schonfeld & Associates, Evanston, Illinois, compile an annual study of advertising expenditures based on an analysis of companies' 10-K Reports. These are filed by publicly-owned companies with the Securities & Exchange Commission. Total spending for advertising--including both media and nonmedia spending, production, etc.--included in the detailed report issued by Schonfeld for 1982 was summarized in the August 15, 1983, issue of Advertising Age, as noted below.

It should be noted that the percents are based on a composite of all reports, including companies which advertise and those who do not.

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Advertising Expenditures

Nonrubber Footwear Industry Advertising Expenditures

Year	Advertising Expend. % of Sales	Advertising Expend. % of Margin	Annual Growth Rate %
1982	3.0	7.9	5.9
1981	3.0	8.2	nr

nr = not reported.

Source: Schonfeld & Associates; Advertising Age. (August 15, 1983)

PRODUCTION

Capacity utilization in the U.S. footwear industry dropped sharply in 1982 due to the pressure of imports and to poor economic conditions, and then went lower in 1983, according to preliminary figures compiled by the U.S. International Trade Commission. The 1983 rate was 70.2%; 1982, 73.4%; 1981, 80.1%; 1980, 77.6%; 1979, 73.5%. Figures compiled by Footwear Industries of America for 1982 showed the lowest utilization rate to be in youths' and boys' nonrubber footwear (42.3%), and for men's footwear and infants' footwear (64.7% and 64.4%, respectively). The highest rate in 1982 was in athletic footwear plants (84.8%).

Nonrubber Footwear

In the first quarter of 1984 production of nonrubber footwear in U.S. plants dropped about 7% below the level in the comparable 1983 period. Production of men's footwear was down 6.7%; women's, down 8.7% and athletic footwear (other than rubber/plastic) off a sharp 40.2%. Production of juvenile footwear, however, in the first quarter of 1984 registered an 8.7% gain.

Final figures are not yet in for the year 1983. However, preliminary Census Bureau reports indicate a decline of less than 1% in the total production of nonrubber footwear (including slippers) compared with the year 1982. The 1983 total was estimated at 340,966,000 pairs compared with the revised total of 342,380,000 pairs in 1982. Production in 1982 fell 8.0% below the 1981 total, continuing the downward trend begun in 1968 when production exceeded 640 million pairs.

Total production of women's nonrubber footwear in 1983 was down 2.4%. However, the drop in specific types was much sharper--masked by a strong gain (+55%) in U.S. production of women's boots.

Men's footwear generally outperformed women's in 1983. Production of men's footwear (except work shoes) gained about 18% over 1982, according to preliminary data, but was, however, below the 1982 level.

PRODUCTION

Rubber/Plastics Footwear

The rubber/plastics footwear industry is composed of two distinct product classes: (1) rubber and plastics protective footwear (hunting boots, galoshes, rubbers, industrial productive footwear, etc.) and (2) rubber or plastic-soled footwear with fabric upper (tennis shoes, sneakers, nonleather athletic footwear and such specialties as espadrilles and other leisure shoes).

Preliminary figures from the Census Bureau for the first three months of 1984 show production of the sneaker type rubber/plastic footwear to be down 9.8%, while protective footwear declined 2.1% compared with the same 1983 period.

This follows a sharp decline in the tennis shoe/sneaker type of footwear in 1983. Production was off over 16% following a 7.1% decline in 1982 compared with 1981.

Rubber/plastic protective footwear output was down 31.4% in 1983, following a 32.6% decline in the previous year.

U.S. Production of Footwear by Type, 1981-1983
(Thousands of Pairs)

				% Change	
	1983(p)	1982(r)	1981(r)	1983/82	1982/81
Footwear total (nonrubber & rubber/plastics excluding protective footwear)	415,018	431,010	467,396	- 3.7%	- 7.8%
Nonrubber footwear, including slippers	340,966	342,380	371,997	- 0.4	- 8.0
Shoes & boots, incl. athletic, total	279,904	277,488	302,228	- 0.9	- 8.2
Men's (excl. athletic)	77,980	71,986	87,192	--	- 17.4
Shoes, dress & casual	49,251	41,792	50,474	+ 17.8	- 17.2
Boots, dress & casual	12,103	10,191	16,048	+ 18.8	- 36.5
Western style	nr	6,612	11,027	--	- 40.0
Work shoes (ankle height or higher)	16,404	19,730	20,339	- 16.9	- 3.0
Steel toes	nr	6,255	6,964	--	- 10.2
Type not specified	222	273	331	- 18.7	- 17.5
Youths' & boys' (excl. athletic)	8,243	9,518	11,266	- 13.4	- 15.5
Boots	nr	1,039	1,252	--	- 17.0
Women's (excl. athletic)	128,547	131,766	135,069	- 2.4	- 2.4
Sandals	116,544	16,864	20,789	- 5.6	- 18.9
Casuals		63,440	58,562		+ 8.3
Dress		43,219	46,611		- 7.3
Boots (ankle height or higher)	11,216	7,252	8,088	+ 54.7	+ 10.3
Type not specified	787	991	1,019	- 20.6	- 2.7
Misses' (excl. athletic)	7,879	8,876	9,902	- 11.2	- 10.4
Children's (excl. athletic)	13,785	11,399	12,921	+ 20.9	- 11.8
Boots	nr	1,776	1,693	--	+ 4.9
Infants' & babies'	21,188	22,587	23,617	- 6.2	- 4.4

(continued)

U.S. Production of Footwear by Type, 1981-1983
(Thousands of Pairs)
(continued)

	1983(p)	1982(r)	1981(r)	% Change 1983/82	% Change 1982/81
Athletic (except with sole vulcanized to fabric upper)	16,396	16,648	17,831	- 1.5%	- 6.6%
Designed for sports	nr	6,474	7,674	--	- 15.6
All other (joggers, etc.)	nr	10,174	10,157	--	+ 0.2
Up to size 3	nr	1,191	1,543	--	- 22.8
Size 3 & over	nr	8,983	8,614	--	+ 4.3
All other shoes, except those with rubber or plastic soles, fabric uppers & rubber/plastic protective footwear (Includes ballet & other theatrical shoes, for example)	3,703	3,355	2,698	+ 10.4	+ 24.3
Shoes exc. men's/women's, type not specified	916	1,005	1,075	- 8.8	- 6.5
Slippers	61,062	64,892	69,769	- 5.9	- 7.0
Men's, youths', boys'	nr	14,591	17,135	--	+ 14.8
Women's, misses'	nr	42,873	45,545	--	- 5.9
Children's, babies', infants	nr	6,853	6,467	--	+ 6.0
Type not specified	nr	575	622	--	- 7.6
Shoes with rubber of plastic soles/ fabric uppers	74,052	88,630	95,399	- 16.4	- 7.1
Fabric upper espadrilles	nr	1,309	nr	--	--
Fabric upper cement process	nr	5,415	nr	--	--
All other	nr	81,906	88,872	--	- 7.8

(p) preliminary
(r) revised
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA-31)

Preliminary information for the year 1983 indicates a sharp decline in U.S. manufacturers' production of protective footwear, with output reaching under 10 million pairs. This follows the 32.6% surge in production in 1982 compared with 1981.

PRODUCTION

U.S. Production of Rubber & Plastic Protective Footwear, 1981, 1982
(Thousands of Pairs)

	1983(p)	1982	1981	% Change 1982/1981
Total	9,685	14,125	10,652	+ 32.6
Rubber upper protective footwear	nr	6,721	4,973	+ 35.1
Boots	--	2,072	1,511	+ 37.1
Lumberman & pacs	--	nr	nr	--
Arctics & gaiters	--	1,744	1,043	+ 67.2
Light & heavy rubbers	--	nr	nr	--
Plastic upper protective footwear	nr	6,027	4,701	+ 28.2
Fabric upper protective footwear	nr	1,377	978	+ 40.8

(p) preliminary
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA-31)

Boots

In 1981 and 1982 the Census Bureau reported data on boots, which had become a major fashion item. Data for 1983 are incomplete at this time, but boot production data currently available for 1981-1983 is recaped below.

After two years of extraordinary growth, demand for western boots dropped sharply in mid-1982, and production for the year was down 40% compared with 1981 as the popularity of the cowboy look dwindled. However, there are now signs for a pick-up in demand for western boots after a 2-year sales slump.

Recap.
Summary of Production of Boots in the U.S., 1981, 1982
(Thousands of Pairs)

	1983(p)	1982(r)	1981(r)
Boots except rubber/plastic, total			
Men's dress & casual, total	12,103	10,191	16,048
Western style	nr	6,612	11,027
Youths', boys'	nr	1,039	1,252
Women's, ankle height or higher	11,216	7,252	8,088
Children's	nr	1,776	1,693
Boots, rubber/plastic	nr	2,072	1,511

(p) preliminary
(r) revised
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports.

PRODUCTION

Percentage Distribution of U.S. Production of Footwear By Categories, 1979-1983

	1983	1982	1981	1980	1979
Total nonrubber footwear	100.0%	100.0%	100.0%	100.0%	100.0%
Men's, youths', boys'	25.3	23.8	26.5	26.4	26.0
Women's, misses'	40.0	41.1	38.9	39.9	40.0
Children's, infants'	10.3	9.9	9.8	9.9	9.3
Athletic	4.8	4.9	4.8	3.9	5.1
All other	19.6	20.3	19.9	19.9	19.5

Source: International Trade Commission based on U.S. Bureau of Census statistics

Seasonal Pattern in Production

Percent of Year's Total Production by U.S. Manufacturers, by Months, 1983
(Based on quantity)

	Nonrubber Footwear Total *	Men's	Women's	Juvenile	Athletic	Slippers
Total, year 1983	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	8.9	7.6	8.1	8.5	9.4	8.4
February	10.2	9.9	9.1	8.8	13.4	8.4
March	10.1	9.2	9.0	8.9	11.5	9.4
April	8.7	8.4	7.5	7.5	10.3	7.6
May	9.6	8.7	8.6	9.1	10.2	8.5
June	9.1	8.6	8.1	8.8	8.0	8.2
July	7.2	6.5	7.5	7.1	4.3	4.9
August	9.8	8.8	9.3	8.5	6.7	9.5
September	9.6	8.8	9.0	8.7	5.3	9.2
October	9.3	8.3	8.5	8.2	6.6	9.7
November	8.9	7.6	7.8	8.3	6.7	9.8
December	8.0	7.6	7.5	7.6	7.6	6.4

* Includes other nonrubber footwear not separately reported.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports.

By Geographic Region of the U.S.

The 7.8% decline in U.S. production of nonrubber footwear in 1982 compared with 1981 was shared (though not equally) by producers throughout the U.S. Factories in New England and in the North Central regions were able to do better than the overall average, thus upping their shares of total production.

New England's share of nonrubber footwear production went from 23.2% in 1981 to 23.7% in 1982. The North Central Region's share increased from 22.7% to 23.9%.

PRODUCTION

By Geographic Region of the U.S.

Production of Nonrubber Footwear by Geographic Area & by Leading States--1981, 1982

	Thousands of Pairs		Percent of Total	
	1982	1981(r)	1982	1981
Nonrubber footwear, U.S. total	342,380	371,997	100.0%	100.0%
New England Division	81,243	86,295	23.7	23.2
Maine	40,459	40,981	11.8	11.0
Massachusetts	24,150	27,718	7.0	7.4
New Hampshire	16,634	17,596	4.9	4.7
Middle Atlantic Division	69,209	75,449	20.2	20.3
New York & New Jersey	37,208	38,565	10.9	10.4
Pennsylvania	32,001	36,884	9.3	9.9
North Central Region	81,706	84,317	23.9	22.7
Illinois	7,103	7,362	2.1	2.0
Wisconsin	6,536	7,149	1.9	1.9
Missouri	37,423	39,587	10.9	10.6
Other states	30,644	30,219	8.9	8.1
South & West Regions	107,378	122,889	31.4	33.0
North Carolina	9,341	9,024	2.7	2.4
Tennessee	26,512	33,138	7.7	8.9
Georgia	4,794	5,689	1.4	1.5
Arkansas	12,565	13,767	3.7	3.7
Kentucky	4,517	4,666	1.3	1.2
Texas	11,774	14,110	3.4	3.8
California	7,095	6,912	2.1	1.9
Other states	30,780	35,583	9.0	9.6
Other*	2,844	3,047	0.8	0.8

*Estimated data for very small companies not included in the mailing panel.

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA31A)

Materials

Rising demand for cattlehides on the part of U.S. tanners has caused an escalation in prices. In the first eight months of 1983, according to the Department of Commerce, the composite average monthly price of three types of cattlehide leather was 49.4 cents a pound, up from 45.7 cents in the same 1983 period. Prices have risen sharply in 1984, however, and will likely exceed the historic high established in 1979 of 75 cents per pound. The producer price index for upper leather as of March 1984 was 16.5% above the level a year earlier and 2.0% above the level in February 1984. Strong demand on the part of European buyers has contributed to this price escalation.

PRODUCTION

Materials

Preliminary information on nonrubber footwear production in the U.S. in 1983 indicates that, overall, 55% of pairs produced had leather uppers, up from 53.2% in 1982, 53.0% in 1981.

Production of Nonrubber Footwear by Material in Uppers
(Shoes, Boots & Slippers)

	1982(r)		1981		1980	
	Mil. Pairs	%	Mil. Pairs	%	Mil. Pairs	%
Total production	342.4	100.0%	372.0	100.0%	386.3	100.0%
Type of upper:						
Leather	182.2	53.2	197.3	53.0	203.7	52.7
Plastic (vinyl)	83.4	24.4	92.2	24.8	108.6	28.1
Other	73.9	21.6	79.4	21.3	70.9	18.4
Not specified	2.8	0.8	3.1	0.8	3.2	0.8

(r) revised

Source: Based on U.S. Bureau of the Census reports.

While production of footwear by U.S. manufacturers has been on the decline, the share of U.S. production accounted for by shoes with leather uppers has held at about 64%. Men's shoes have the highest percentage of leather uppers (almost 91% in 1982). Not including rubber/plastic soled athletic footwear, athletic shoe types made in the nonrubber footwear classification have registered a sharp decline in the percentage with leather uppers in recent years.

Share of U.S. Production of Selected Types of Nonrubber Footwear Which Have Leather Uppers

	Percent of Total		
	1982(r)	1981(r)	1980
Leather uppers in shoes, total*	63.6%	63.7%	63.5%
Men's shoes, except athletic	90.8	87.9	86.7
Women's shoes, except athletic	54.8	54.2	54.8
Athletic footwear	49.9	51.5	68.6

* Includes shoe types not separately listed
(r) revised

Source: Based on U.S. Bureau of the Census, Current Industrial Reports.

Allowing for imports, the total supply of footwear available to consumers shows a different picture in regard to types of upper material, and leather's share is sharply reduced.

PRODUCTION

Materials

Preliminary data on the overall supply of nonrubber footwear in the U.S. in 1983 indicates a growth in the percentage of women's nonrubber footwear and of athletic footwear which had leather uppers. In men's footwear, however, the trend away from leather uppers continued and the percentage accounted for by leather was sharply below the 1979 level.

Allowing for U.S. production, less exports, plus imports, the following shows the total apparent consumption of footwear accounted for in terms of types of upper materials.

Percent Distribution of Apparent U.S. Consumption of Footwear
By Types of Upper Material

Nonrubber Footwear	1983(p)	1982	1981	1980	1979
Nonrubber footwear, total					
Leather	49.3	48.4	49.6	47.4	48.6
Plastic	28.9	31.5	32.9	36.9	34.3
All other	21.8	20.1	17.5	15.7	17.1
Men's, youths', boys', except athletic					
Leather upper	56.6	58.6	67.1	67.9	72.8
Plastic	18.3	18.9	24.6	25.7	21.1
All other	25.1	22.5	8.3	6.4	6.1
Women's, misses', except athletic					
Leather	47.1	43.8	45.9	41.4	43.8
Plastic	39.1	43.7	42.3	47.8	41.8
All other	13.8	12.5	11.8	10.8	14.4
Children's (except athletic), infants'					
Leather	28.5	33.3	37.8	36.6	43.6
Plastic	32.9	37.3	35.6	43.7	38.1
All other	38.6	29.4	26.6	19.7	18.3
Athletic footwear (not incl. rubber/plastic soled)					
Leather	14.3	11.0	9.0	8.4	9.2
Plastic	11.6	14.6	14.5	20.6	22.8
All other	74.1	74.4	76.5	71.0	68.0

Source: Prehearing Report, U.S. International Trade Commission, based on U.S. Dept. of Commerce data. (April 1984)

SHIPMENTS

Monthly estimates on production and shipments of footwear by U.S. manufacturers based on mail surveys are compiled by the U.S. Census Bureau in the Current Industrial Reports series. Annual estimates on a broader base are issued by the Bureau in the Annual Surveys of Manufactures (of which the most recent report covers 1981) and in the complete census of manufactures compiled every five years (1982 data to be issued in 1984-1985).

In the first three months of 1984, according to CIR data, nonrubber footwear shipped by U.S. plants declined 6.6% in quantity and 5.3% in value compared with January-March 1983. In the same period, there was a decline of 4.0% in quantity of rubber/plastic footwear of the sneaker type, and value was off under 1%. Shipments of rubber/plastic protective footwear were up slightly (+0.3%) in quantity, but value was reported to be off 7.5%.

The Bureau of Industrial Economics, U.S. Department of Commerce, has issued the following estimates on total footwear shipments by all producers in the U.S.

Value of Footwear Shipments By All U.S. Producers, 1979-1983

	Millions of Current $				Compound Annual	Est.	% Change
	1983*	1982*	1981	1979	Growth Rate, 1972-83	1984	1984/83
Nonrubber footwear							
Total value	$4,655	$4,576	$5,221	$4,261	3.6%	--	--
Men's (exc. athletic)	1,903	1,757	2,156	1,749	4.4	--	--
Women's (exc. athletic)	1,796	1,851	1,995	1,617	2.6		
Slippers	197	239	268	258	2.0		
Footwear, n.e.c.	759	729	802	637	4.3		
	Millions of 1972 $						
Total value	2,225	2,258	2,631	2,412		$2,190	- 1.6%
Men's (exc. athletic)	812	757	958	864	- 3.3	820	1.0
Women's (exc. athletic)	894	968	1,078	1,002	- 3.7	867	- 3.0
Slippers	99	123	136	150	- 4.2	100	- 1.0
Footwear, n.e.c.	420	410	459	396	- 1.1	403	- 4.0
Rubber/plastics footwear	Millions of Current $						
Total value	560	560	561	478	1.1	--	--
	Millions of 1972 $						
Total value	333	335	339	311	33.5	330	- 0.9

*Estimated by BIE. The Census Bureau's figures for 198[illegible], published in the Current Industrial Reports Series (on which figures shown in the PRODUCTION section of this Fact File are based) differ somewhat from the above and are covered in the following table.

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of Industrial Economics, 1984 U.S. Industrial Outlook.

SHIPMENTS

Quantity & Value of Shipments, 1981, 1982
By Type of Footwear

	Quantity (thous. pairs)		Value (mil. $)		% Change 1982/83	
	1982	1981	1982	1981	Quantity	Value
Nonrubber footwear, total	346,434	374,785	$4,551.3	$4,816.8	- 7.6%	- 5.5%
Men's (exc. athletic)	75,332	87,364	1,871.7	2,060.3	- 13.8	- 9.1
Dress & casual	44,193	51,386	914.1	986.2	- 14.0	- 7.3
Boots, western style	7,791	11,513	368.6	461.4	- 32.3	- 20.1
Boots, dress, casual	3,097	4,138	82.3	109.5	- 25.2	- 24.9
Workshoes	19,960	19,990	499.4	496.5	- 0.2	+ 0.6
Shoes, n.s.k.	291	337	7.2	6.6	- 13.6	+ 9.1
Youths' & boys' (except athletic)	9,190	10,732	89.5	103.5	- 14.4	- 13.6
Women's (except athletic)	131,151	136,077	1,797.2	1,815.1	- 3.6	- 1.0
Sandals	18,198	20,552	196.3	243.3	- 11.5	- 19.3
Casual, exc. sandals	61,301	59,641	745.3	674.5	+ 2.8	+ 10.5
Dress	43,334	46,925	626.0	635.2	- 7.6	- 1.4
Boots	7,351	7,945	216.2	248.8	- 7.5	- 13.1
Shoes, n.s.k.	975	1,014	13.4	13.4	- 3.8	--
Misses' (except athletic)	8,516	9,991	80.4	105.6	- 14.8	- 23.8
Children's (except athletic)	11,169	13,098	107.1	122.3	- 14.7	- 12.4
Babies'	22,930	24,709	123.9	134.9	- 7.2	- 8.1
Athletic	17,188	17,221	226.1	214.4	- 0.2	+ 5.4
All other	4,104	3,511	23.8	21.4	+ 16.9	+ 11.2
Other	1,127	1,208	9.9	10.2	- 6.7	- 2.9
Slippers	65,727	70,874	221.9	228.1	- 7.3	- 2.7
Men's, youths', boys'	14,894	16,639	64.0	61.3	- 10.5	+ 4.4
Women's, misses'	43,674	47,156	144.2	151.2	- 7.4	- 4.6
Children's, babies'	6,553	6,427	11.6	13.6	+ 2.0	- 14.7
Slippers, n.s.k.	606	652	2.0	2.1	- 7.0	- 4.8
Rubber/plastic footwear						
Rubber/plastic sole/fabric upper, total	89,175	94,935	507.0	526.9	- 6.1	- 3.8
Rubber/plastic protective footwear, total	14,099	11,094	131.6	107.2	+ 27.1	+ 22.8
Rubber upper	6,504	5,363	73.5	57.1	+ 21.3	+ 28.7
Plastic upper	6,183	4,701	45.7	38.5	+ 31.5	+ 18.7
Fabric upper	1,412	978	12.5	11.6	+ 44.4	+ 7.8

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census, Current Industrial Reports Footwear, 1982 (MA31A(82)-1).

SHIPMENTS

Focusing on boots, which have enjoyed fashion significance in recent years, there was a marked downturn in popularity after 1981, particularly in men's western styles. Detailed figures for 1983 are not currently available, but following is the trend in shipments of boots by U.S. manufacturers from 1980-1982. In recent months there are signs of a revival in consumers interest in western boots.

Recap.

Quantity & Value of U.S. Shipments of Boots, 1980-1982

	Quantity (thous. pairs)			Value (millions of $)		
	1982	1981	1980	1982	1981	1980
Total reported	20,225	25,107	25,738	$ 699.8	$ 844.3	$ 720.8
Men's boots	10,888	15,651	14,521	450.9	570.9	483.9
Western style	7,791	11,513	14,521	368.6	461.4	483.9
Dress & casual	3,097	4,138		82.3	109.5	
Women's boots	7,351	7,945	8,778	216.2	248.8	207.3
Rubber boots	1,986	1,511	2,439	32.7	24.6	29.6

Source: U.S. Bureau of the Census, Current Industrial Reports.

Shipments by Class of Customer

The latest information issued by the Census Bureau covering the distribution of U.S. manufacturers' shipments (value) by class of customer is for the year 1980. Independent wholesalers are of minor importance in the footwear distributuion picture.

Distribution of Manufacturers' Sales of Shoes & Slippers
By Class of Customer, 1980
(Not Including Rubber/Plastic Footwear)

	Type of Footwear				
	Men's Shoes, Exc. Athletic	Women's Shoes, Exc. Athletic	Athletic Footwear	All Other Footwear	Slippers
Total shipments	100.0%	100.0%	100.0%	100.0%	100.0%
Retail stores & outlets of this company	22.9	18.4	37.9	23.1	5.6
Independent retailers	27.0	32.0	10.6	28.5	22.7
All other retailers	38.5	39.1	22.7	29.0	59.3
Wholesalers	8.2	7.4	28.3	18.5	10.2
All others, incl. govt. & for export	3.4	3.1	0.8	0.9	2.2
Total sales (mil. $)	$2,000.2	$1,763.6	$245.9	$469.4	$253.1

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Series MA-31A.

PRODUCER (FACTORY) PRICES

As of March 1984 producer prices for footwear of all types averaged 2% above the level in the same 1983 month and were 5.6% above the March 1982 average. Rising leather and freight charges in 1984 indicate a sharper rise in footwear prices in the last half of 1984 for domestic footwear and many imports.

Producer Price Indexes on Footwear
As of March, 1982-1984

		Index for March		
	Base Period	1984	1983	1982
All footwear	1967	253.3	248.1	239.8
Men's footwear	1967	291.9	285.6	281.9
With leather upper	1967	292.8	286.5	283.0
Dress, casual	12/80	108.4	106.6	104.0
Boots	12/80	111.8	111.1	113.1
Work shoes, boots	12/80	114.4	109.7	109.7
Other	12/80	108.4	107.8	109.2
With plastic upper	12/80	106.1	103.9	101.8
Women's footwear	1967	228.4	224.6	211.3
With leather upper	1967	223.1	220.4	207.7
Dress	12/80	107.1	102.4	102.0
Casual	12/80	102.4	100.3	96.9
Sandals	12/80	92.4	99.3	nr
Boots	12/80	111.0	109.1	90.3
Other	12/80	113.3	111.9	109.6
With plastic upper	12/80	103.1	98.8	94.7
Children's footwear size 8½-12	1967	214.2	208.5	205.5
Misses	6/80	102.7	101.1	99.8
Youths' & boys', size 12½-6	6/80	120.0	111.9	108.5
Infants', babies'	6/80	115.7	110.2	109.5
Athletic	6/80	102.4	101.5	102.5

Source: U.S. Bureau of Labor Statistics

Preliminary information for April 1984 showed wholesale footwear prices up 0.7% from April 1983 on a seasonally unadjusted basis. After adjustment, April prices were down 1.4% from the previous month. Prices for women's footwear declined 0.9% compared with March, and men's declined 0.4%. Wholesale prices for athletic footwear increased 0.5% in April compared with March and were 1.4% above April 1983.

FOREIGN TRADE

Imports

In the year 1983, U.S. imports of footwear of all types in terms of pairs gained almost 18% compared with the 1982 total. Nonrubber footwear imports were up 21.3% and rubber/plastic footwear imports gained 3.6%. Nonrubber footwear represented 81.5% of total pairs and 91.7% of value of imports in 1983 (measured at port of exit.)

FOREIGN TRADE

Imports

Imports have continued to surge in 1984. In the month of April they reached a record total of 70.3 million pairs of nonrubber footwear compared with 45.6 million pairs in the same month of 1983. This represents a record-breaking increase of 54.2%. Total imports in the first four months of 1984 reached a record 264.5 million pairs of nonrubber footwear, up from 206 million in the same 1983 period (a 27.9% gain).

Through the Footwear Industries Association, as well as two labor unions, the domestic nonrubber footwear industry in 1984 sought to stem the tide of imports through Section 201 of the Tariff laws covering the imposition of global quotas that would allow imports to take no more than 50% of the total U.S. market. In 1983, overall imports of nonrubber footwear accounted for 63.6% of U.S. consumption, up from 59% in 1982. In athletic footwear, imports accounted for almost 86%. Assuming that production has continued to decline while imports have risen, in the first half of 1984 imports could be accounting currently for some 75% of the U.S. market for nonrubber footwear.

However, on June 6, 1984, the United States International Trade Commission rejected the plea of the industry for protection from cheaper imports over the next five years on the basis that shoe imports had not seriously hurt American workers or businessmen, and no quotas were to be imposed. This ruling was received with dismay by U.S. manufacturers (who plan to appeal the decision and file a court suit); but hailed by importers and volume-priced retail operations, who had claimed that the protection wanted by the industry would have cost American consumers $10 billion over a five year period, as imports of lower-priced shoes would be affected much more than expensive types from Italy or Britain. The ITC noted that import growth partly reflected increased consumer spending, as domestic production stabilized at 341 million pairs.

The June ruling followed other unfavorable decisions made in 1983--the revocation of countervailing duties (CVD) applying to imports from Brazil, Spain and India, in May 1983 and the rejection of the industry's claim under Secton 301 that the widespread use of tariff and nontariff trade barriers on nonrubber footwear left the U.S. industry vulnerable to injury as an unrestricted market.

Cheaper footwear has been coming into the U.S. in growing quantity, particularly from Taiwan, South Korea and Brazil. The average value per pair of nonrubber footwear imported into the U.S. dropped from $6.43 in 1982 to $6.29 in 1983.

Taiwan is the leading source of footwear imported by the U.S. In the first quarter of 1984, Taiwan shipped 81.2 million pairs, a 20.6% gain over the total in the first quarter of 1983. Imports from Brazil have soared in recent months, and this country replaced South Korea as the second largest supplier to the U.S., shipping 26.8 million pairs, or 70.5% more than in the first quarter of 1983.

Besides efforts to meet competition from lower-priced imports through the installation of modern labor-saving machinery and equipment, the American footwear industry has stepped up other measures--including becoming direct importers themselves of finished footwear and opening up their own retail outlets in the U.S.

The industry has not leaned heavily on Section 807 of the U.S. Tariff schedules which allows U.S. manufacturers to send components, such as cut leather uppers, offshore for assembly and then to reimport the finished product--paying duty only on the value added in the foreign factory. This was seen as becoming a bigger factor if quotas were imposed and sourcing of finished shoes offshore became too expensive.

FOREIGN TRADE

Imports

In 1983, total imports of shoes under Section 807 amounted to only $58.2 million in value, up 20%, however, from $48.5 million in 1982--with most (58.6%) coming out of Mexico, followed by Korea (18.3%).

Some large manufacturers, such as Brown Shoe Co., import components (such as fitted uppers) to assemble into finished footwear in the U.S., thus saving on labor costs while maintaining domestic factory employment at steady levels. Domestic shoe manufacturers imported 14.9 million pairs of unlasted leather uppers in 1983, up 38.5% from the 1982 total. Imports of rubber/plastic shoe uppers totaled about 11 million pairs, up 55% over 1982; imports of cotton and fiber shoe uppers rose 25.2% to reach 8.4 million pairs.

U.S. manufacturers are now accounting for a growing percentage of finished footwear imports. According to figures compiled by Volume Footwear Retailers of America (Footwear News, May 21, 1984) such imports represented 38.5% of import volume in 1983--up from 24% in 1981. Manufacturers' athletic footwear imports' share was reported at 56% in 1983. In an industry analysis by Business Trend Analysts, Inc. it was reported that imports generated 10% of U.S. manufacturers' sales in 1983. (Footwear News, June 11, 1984).

In another move to stand up under competition from imports, U.S. manufacturers are opening their own retail outlets, which can handle their own lower-priced brands sourced abroad.

Summary of Nonrubber Footwear Imports For Consumption in the U.S.
By Categories, 1979-1983
(Quantity in Thousands of Pairs)

	1983	1982	1981	1980	1979
Footwear, nonrubber, total	581,857	479,663	375,600	365,743	404,563
Men's, youths', boys' (except athletic)	133,408	105,029	70,224	68,627	70,205
Women's, misses' (except athletic)	307,913	252,857	223,007	221,334	271,627
Children's, infants'	52,276	34,577	25,010	22,165	22,236
Athletic	88,042	86,997	57,295	53,571	40,366
All other	218	204	65	46	129

Source: U.S. International Trade Commission based on U.S. Bureau of the Census data.

Compared with imports in 1979, the sharpest jump in quantity by 1983 was in children's, infants' footwear (up 135.1%), and this category registered the sharpest gain (+51.2%) in 1983 compared with 1982. Imports of athletic footwear in 1983 were 118.1% ahead of 1979, but registered a rise of only 1.2% in 1983 compared with 1982.

FOREIGN TRADE

Imports

U.S. Footwear Imports by Type, 1982, 1983

	1983					1982		% Change 1983/1982	
	Pairs (Mil.)	% of Total	Value # (Mil. $)	% of Total	Avg. Value Per Pair	Pairs (Mil.)	Value # Mil.$	Pairs	Value
Footwear, total	$ 714.1	100.0%	$3,993.1	100.0%	$ 5.59	607.4	$3,418.6	+ 17.6%	+ 16.8%
Nonrubber footwear, total	581.9	81.5	3,662.0	91.7	6.29	479.7	3,083.9	+ 21.3	+ 18.7
Rubber/plastics footwear, total	132.3	18.5	331.1	8.3	2.50	127.7	334.7	+ 3.6	- 1.1
By type of footwear:									
Men's & boys', total	183.0	25.6	1,298.5	32.5	7.10	160.3	1,178.9	+ 14.2	+ 10.1
Women's & misses', total	316.9	44.4	1,975.7	49.5	6.23	262.9	1,610.2	+ 20.5	+ 22.7
Children's & infants', total	55.3	7.7	164.6	4.1	2.98	38.8	116.5	+ 42.5	+ 41.3
Type not specified, total	26.7	3.7	223.2	5.6	8.36	17.5	178.1	+ 52.6	+ 25.3
Dress & casual footwear, total	321.8	45.1	2,263.4	56.7	7.03	266.8	1,900.6	+ 20.6	+ 19.1
Leather uppers, total (N)	179.0	25.1	1,739.5	43.6	9.71	130.7	1,380.5	+ 37.0	+ 26.0
Men's & boys'	40.1	5.6	454.8	11.4	11.33	30.1	388.9	+ 33.2	+ 16.9
Women's & children's	137.3	19.2	1,267.5	31.7	9.23	99.6	977.5	+ 37.9	+ 29.7
Other, not specified	1.6	0.2	17.1	0.4	10.90	1.0	14.1	+ 60.0	+ 21.3
Lined vinyl uppers, total (N)	142.7	20.0	523.9	13.1	3.67	136.2	520.1	+ 4.8	+ 0.7
Men's & boys'	22.1	3.1	91.9	2.3	4.14	21.5	96.5	+ 2.8	- 4.8
Women's & children's	105.8	14.8	391.8	9.8	3.70	102.2	386.9	+ 3.5	+ 1.3
Children's & infants'	14.8	2.1	40.2	1.0	2.72	12.5	36.7	+ 18.4	+ 9.5
Athletic, total	190.5	26.7	916.0	22.9	4.81	185.0	932.5	+ 3.0	- 1.8
Leather uppers, total (N)	79.2	11.1	580.0	14.5	7.32	76.9	582.7	+ 3.0	- 0.5
Men's & boys'	55.2	7.7	437.4	10.9	7.92	57.1	456.1	- 3.3	- 4.1
Women's & children's	23.7	3.3	138.8	3.5	5.86	19.5	123.1	+ 21.5	+ 12.7
Ski boots	0.3	*	3.8	0.1	12.54	0.3	3.4	--	+ 11.8
Fabric uppers, total (R)	102.5	14.3	256.9	6.4	2.50	98.0	272.7	+ 4.6	- 5.8
Joggers	12.7	1.8	41.9	1.0	3.30	10.5	40.9	+ 20.9	+ 2.4
Sneakers	51.9	7.3	151.4	3.8	2.92	51.7	168.8	+ 0.4	- 10.3
Other	37.9	5.3	63.6	1.6	1.68	35.8	63.0	+ 5.9	+ 0.9
Lined vinyl uppers, total (R)	8.8	1.2	79.1	2.0	8.96	10.1	77.2	- 12.9	+ 2.5
Men's & boys'	4.7	0.7	18.9	0.5	4.02	6.3	26.5	- 25.4	- 28.7
Women's & misses'	2.1	0.3	8.1	0.2	3.82	2.1	9.1	--	- 11.0
Children's & infants'	0.7	0.1	2.3	0.1	3.10	0.6	2.2	+ 16.7	+ 4.5
Ski boots	1.2	0.2	49.7	1.2	39.94	1.0	39.3	+ 20.0	+ 26.5
Work footwear, leather, total (N)	8.0	1.1	93.7	2.3	11.65	6.9	84.0	+ 15.9	+ 11.5
Boots & protective footwear, nonleather, total (R)	13.5	1.9	69.5	1.7	5.13	11.1	56.2	+ 21.6	+ 23.7
Other footwear, total	180.2	25.2	650.5	16.3	3.61	137.5	445.2	+ 31.0	+ 46.1
Unsupported rubber or plastic, total (N)	30.1	4.2	102.6	2.6	3.40	26.1	93.7	+ 15.3	+ 9.5
Men's & boys'	5.3	0.7	20.2	0.5	3.81	3.5	14.4	+ 51.4	+ 40.2
Women's & misses'	21.5	3.0	73.7	1.8	3.43	20.0	72.7	+ 7.5	+ 1.4
Children's & infants'	3.3	0.5	8.6	0.2	2.57	2.6	6.6	+ 26.9	+ 30.3
Zories (R)	16.2	2.3	4.7	0.1	0.29	18.6	5.9	- 12.9	- 20.3
Fiber uppers (N)	37.5	5.2	106.2	2.7	2.83	22.3	62.8	+ 68.2	+ 69.1
Wood (N)	1.2	0.2	7.2	0.2	6.14	3.0	18.3	- 60.0	- 60.6
Other (N)	95.2	13.3	429.8	10.8	4.51	67.5	264.5	+ 41.0	+ 62.5

(N) = Nonrubber
(R) = Rubber
The import value is the wholesale value at the foreign port of exit. It does not include freight, insurance and other charges, such as U.S. import duties, incurred in bringing the merchandise to the U.S.
* Less than 0.1%.

Source: Fairchild Market Research Department based on U.S. Department of Commerce, Bureau of the Census data.

FOREIGN TRADE

Imports

Imports of rubber/plastic footwear were up only 3.6% in 1983 compared with 1982, following the 23% drop reported in 1982 compared with 1981. Figures compiled by Footwear Industries of America indicated that in rubber/plastics footwear, imports held a 58% share of the total U.S. market in 1982.

In nonrubber footwear, the biggest penetration in the U.S. market by category is in athletic footwear.

Nonrubber Footwear: U.S. Imports Relative to U.S. Consumption & To Production, 1979-1983

	1983	1982	1981	1980	1979
Ratio of Imports to Consumption					
Nonrubber footwear, total	63.6	59.0	51.0	49.5	50.9
Men's, youths', boys'	61.4	57.3	42.6	41.2	41.0
Women's, misses'	69.8	64.7	61.2	59.5	63.4
Children's, infants'	60.1	50.7	40.9	36.9	37.8
Athletic	85.8	85.3	78.6	82.9	69.0
All other	0.3	0.3	0.1	0.1	0.2
Ratio of Imports to Production					
Nonrubber footwear, total	170.5	140.1	101.0	94.7	101.4
Men's, youths', boys'	155.1	128.9	71.3	67.3	67.6
Women's, misses'	226.2	179.8	153.8	143.5	170.1
Children's, infants'	148.8	101.7	68.4	57.8	59.9
Athletic	541.3	522.6	321.3	356.2	196.6
All other	0.3	0.3	0.1	0.1	0.2

Source: U.S. International Trade Commission based on U.S. Bureau of the Census Reports.

Exports

The strong American dollar has made U.S. products more expensive abroad, and U.S. exports of footwear in 1983 were down 15.7% compared with 1982, reaching a total of 7,496 thousand pairs of nonrubber footwear. This compares with a recent peak of 12,999 thousand pairs in 1980. Value of U.S. exports were reported at $90 million in 1983. Exports of rubber/plastics footwear in 1983 are estimated at $12 million, down from $18 million in 1982.

U.S. footwear exports are concentrated in athletic, western boot, men's casual, work and hunting boot classifications. Canada, which was formerly a good customer, has announced that their quota on shoe imports, first imposed in 1977 and due to expire at the end of 1984, will be extended to March 1986. Restraints against American footwear are also in effect in other countries. Brazil will not allow American shoes to be imported; Taiwan and South Korea levy duties on U.S. footwear of more than 50%; Japan allows only one million pairs to be imported in a single year.

MARKET SUPPLY

The total supply of footwear, based on U.S. production less exports plus imports --also referred to as "apparent consumption"--reached over one billion pairs in 1982, according to the U.S. Census Bureau, of which 813 million pairs were in the nonrubber footwear classification. Preliminary figures for 1983 indicate the market supply of nonrubber footwear reached 915.6 million pairs, gaining 12.6% over the 1982 total, up 15.3% compared with 1979.

Summary of Market Supply, 1981, 1982
(Quantity in millions of pairs)

	Domestic Production		Exports		Imports		Total Supply	
	1982	1981	1982	1981	1982	1981	1982	1981
Total footwear	445.1	478.0	10.6	13.3	589.7	514.1	1,024.2	978.9
Nonrubber footwear	342.4	372.0	8.9	11.2	479.5	369.0	813.1	729.8
Rubber/plastic soles-fabric upper footwear	88.6	95.4	1.4	1.6	99.0*	137.6	186.3	231.5
Rubber/plastic protective footwear	14.1	10.7	0.4	0.6	11.1*	7.5	24.8	17.6

*The rubber/plastic total is lower than that shown in the detailed table on imports, due to unpublished revisions in data.

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear, 1982 (MA31A)

Preliminary data on market supply for 1983 has been included in a U.S. International Trade Commission report, as noted below, covering nonrubber footwear.

Market Supply of Nonrubber Footwear by Classification
1979-1983

	1983	1982	1981	1980	1979
Total nonrubber footwear supply (thous. pairs)	915,556	813,153	736,418	739,055	794,173
Percent	100.0%	100.0%	100.0%	100.0%	100.0%
Men's, youths', boys', except athletic	23.7	22.5	22.4	22.6	21.6
Women's, misses'	48.3	48.0	49.5	50.3	54.0
Children's, infants'	9.5	8.4	8.4	8.1	7.4
Athletic	11.2	12.5	9.9	8.7	7.4
Other	7.3	8.5	9.9	10.3	9.7

Source: U.S. International Trade Commission based on U.S. Census Bureau reports.

RETAIL TRADE

Consumer Expenditures

Preliminary figures on personal consumption expenditures in 1983 compiled by the U.S. Bureau of Economic Analysis place the value at retail of footwear reaching consumers through any channel at $21,561 million, representing a gain of 6.3% over the 1982 total. Sales through retail outlets in 1982 have been estimated at $17.7 billion, covering 695.9 million pairs, by Footwear Market Index. A total of $18.8 billion is indicated in retail sales for 1983.

Personal Consumption Expenditures For Footwear, 1979-1983
(millions of dollars)

1983	1982	1981	1980	1979
$21,561	$20,276	$19,395	$17,405	$16,291

Source: U.S. Bureau of Economic Analysis

A breakdown of spending by classification is not reported. However, it is estimated that personal consumption expenditures for women's footwear amounted to about $12.7 billion; men's and boys' $8.0 billion; infants'/babies', $900 billion in 1983. Footwear represented about 1.0% of total personal consumption expenditures in 1983 and 1982, down from 1.2% in 1973.

Size of the Consumer Market

Population Projections--1983-2000*

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
FEMALE							
Total, all ages	120,216	128,234	137,611	+ 14.5%	100.0%	100.0%	100.0%
Under 5 years	8,713	9,369	8,601	- 1.3	7.2	7.3	6.3
5 to 9 years	7,793	9,080	9,157	+ 17.5	6.5	7.1	6.6
10 to 15 years	10,417	9,791	11,419	+ 9.6	8.7	7.6	8.3
16 years & over	93,293	99,994	108,436	+ 16.2	77.6	78.0	78.8
16-19	7,654	6,704	7,373	- 3.7	6.4	5.2	5.4
20-34	30,925	30,774	26,442	- 14.5	25.7	24.0	19.2
35-54	26,458	32,170	40,810	+ 54.2	22.0	25.1	29.6
55 & over	28,256	30,346	33,811	+ 19.7	23.5	23.7	24.6
Median age (years)	32.6	34.3	37.7	+ 17.1			
MALE							
Total, all ages	113,977	121,498	130,379	+ 14.4	100.0	100.0	100.0
Under 5 years	9,133	9,831	9,024	- 1.2	8.0	8.1	6.9
5 to 9 years	8,155	9,519	9,601	+ 17.7	7.1	7.8	7.4
10 to 15 years	10,892	10,240	11,968	+ 9.9	9.6	8.4	9.2
16 years & over	85,797	91,907	99,787	+ 16.3	75.3	75.6	76.5
16-19	7,958	6,999	7,709	- 3.1	7.0	5.8	5.9
20-34	31,162	31,301	27,071	- 13.1	27.3	25.8	20.8
35-54	25,302	31,066	40,002	+ 58.1	22.2	25.5	30.7
55 & over	21,376	22,541	25,005	+ 17.0	18.8	18.5	19.1
Median age (years)	29.6	31.8	34.9	+ 17.9			

(continued)

RETAIL TRADE

Size of the Consumer Market

Population Projections--1983-2000*
(continued)

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
TOTAL, MALE & FEMALE							
Total, all ages	234,193	249,731	267,990	+ 14.4%	100.0%	100.0%	100.0%
Under 5 years	17,846	19,200	17,624	- 1.2	7.6	7.7	6.5
5 to 9 years	15,948	18,599	18,758	+ 17.6	6.8	7.4	7.0
10 to 15 years	21,309	20,030	23,386	+ 9.7	9.1	8.0	8.7
16 years & over	179,090	191,901	208,222	+ 16.3	76.5	76.8	77.7
16-19	15,612	13,703	15,083	- 3.4	6.7	5.5	5.6
20-34	62,087	62,073	53,513	- 13.8	26.5	24.8	20.0
35-54	51,759	63,236	80,812	+ 56.1	22.1	25.3	30.2
55 & over	49,632	52,889	58,814	+ 18.5	21.2	21.2	21.9
Median age (years)	30.9	33.0	36.3				

*Middle series projections (out of three) which assumes a fertility rate of 2.1, or at the replacement level.

NOTE: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Series 25, No. 922
(October 1982)

Consumer Prices

In the six months ending April 1984, the consumer price index for all urban consumers covering footwear was up 1.1% compared with the previous six months. The annual average for 1983 was less than 1% (+0.68%) compared with 1982. Further increases in the rate are expected in view of rising materials costs.

Consumer Price Index For Footwear
Seasonally Adjusted For All Urban Consumers
April 1984, Annual Averages 1982, 1983
(1967 = 100)

	April 1984	Annual Average		% Change
		1983	1982	1983/1982
Footwear	208.3	206.9	205.5	+ 0.7%
By type (12/77 = 100)				
Men's	na	133.6	132.0	+ 1.2
Boys', girls'	na	130.9	130.0	+ 0.7
Women's	na	125.6	125.5	+ 0.1

na = not available

Source: U.S. Bureau of Labor Statistics.

RETAIL TRADE

Retail Sales By Type of Outlet

Until findings in the 1982 Census of Retail Trade are released by the U.S. Census Bureau the latest official information on market share by type of outlet is based on the 1977 Census. However, an analysis of the U.S. footwear industry prepared by Business Trend Analysts (BTA) Inc., Commack, N.Y. (Footwear News, June 4, 1984) indicated that shoe stores are losing market share although they still command the largest percent of total footwear sales.

According to this report, the country's 26,000 self-contained shoe stores had footwear sales of $8.4 billion, or 45.6% of the $18.3 billion in retail footwear sales. This compares with a 50.4% share in 1972.

Apparel specialty stores and sporting goods stores have increased their market shares. In 1982, apparel stores were reported to have a 13.1% share of footwear sales, compared with 10.3% in 1972, aided by the growing importance of narrow lines of high-fashion footwear. With the boom in consumer interest in sports and fitness, sporting goods stores garnered a 3.5% share of total footwear sales, according to BTA, up from less than 1% ten years ago.

Department stores and other general merchandise stores declined only slightly, from 35.3% in 1972 to 34% in 1982, according to the report.

Outlet types which have maintained volume while emphasizing price and cutting operating costs by maintaining largely self-service operations--such as the 1,300-unit Volume Shoe and 190-unit Shoe Town--have shown the fastest rate of growth in footwear sales.

Another development cited in this report is the growth of manufacturer-owned retail outlets. In 1980, 21.1% of domestic manufacturers' shipment went to the companies' own retail stores and outlets, compared with 19.2% in 1978. In addition, the growth of giant shoe chains--such as Melville Corporation's 2,000 store Meldisco and 1,200 store Thom McAn divisions--which account for a large share of sales, have fostered close ties between manufacturers and retailers. Only 10% of domestic manufacturers' sales volume is channeled through independent wholesalers; most is shipped directly to the warehouses of large chains.

Leading Markets

According to Sales & Marketing Management Magazine (1983 Survey of Buying Power, Part II, October 31, 1983), the top 10 metropolitan areas accounted for 25% of total retail sales of footwear, which they estimated at $15.9 billion in 1982. The New York metropolitan area lead the list, with a 4.2% share; Chicago was second (3.4%), followed by Los Angeles-Long Beach (3.3%).

RETAIL TRADE

Leading Markets

Footwear Sales in Leading Metropolitan Markets, 1982

Area	(Thous. $)	Rank
New York, N.Y.	$ 672,176	1
Chicago, Ill.	547,437	2
Los Angeles-Long Beach, Calif.	533,152	3
Boston-Lawrence-Salem-Lowell-Brockton, Mass.	526,544	4
Houston, Tex.	350,141	5
Detroit, Mich.	340,329	6
Philadelphia, Pa.	309,584	7
Washington, D.C.	281,827	8
Dallas, Tex.	233,573	9
Nassau-Suffolk, N.Y.	210,737	10
Subtotal	4,005,500	
U.S. total	$15,916,463	

Source: Sales & Marketing Management, October 31, 1983

Shoe Stores

According to the BTA report cited above (Retail Sales By Outlet Type) there were 35,000 self-contained shoe stores plus leased shoe departments in operation in the U.S. in 1982. Shoe stores, alone, were estimated at 26,000. U.S. Bureau of the Census data shows a sharp increase in the share of shoe store sales accounted for by chains. Stores in organizations of 11 or more stores held a 51.4% share of the shoe store total in 1983, up from 41.4% in 1979. Many of these stores are footwear manufacturer-owned.

The latest data on sales by type of shoe store is in the 1977 Census of Retail Trade (U.S. Bureau of the Census). In that year men's shoe stores accounted for 12.1% of shoe store business; women's shoe stores, 23.2%; family shoe stores, 61.1%; children's shoe stores, 2.6%.

Shoe Store Sales, 1980-1983
(Millions of Dollars)

					% Change		
	1983	1982(r)	1981	1980	1983/82	1982/81	1981/80
Shoe store sales, total	$9,266	$8,903	$9,279	$8,307	+ 4.1%	- 4.1%	+11.7%
Chain shoe stores (11 or more store orgs.)	4,761	4,337	3,854	3,457	+ 9.8	+12.5	+11.5
% of shoe store total	51.4%	48.7%	41.5%	41.6%			

(r) revised

Source: U.S. Bureau of the Census.

RETAIL TRADE

Shoe Stores

According to preliminary results in a survey by the National Shoe Retailers Association (NSRA), American shoe stores have suffered a drop in profits in recent years. Preliminary results show pretax net income down 1.2% in 1983, after a 1.3% decline in 1982, even though most stores had sales gains. (*Footwear News*, June 4, 1984)

A decline in profitability was also reported in an industry analysis by Business Trends Analysts, which showed pretax profits of shoe retailers down from 4.4% of sales in 1979-80 to 2.4% in 1982-83. Deterioration in gross margin was cited as the main cause, as retailers held down initial markups and took substantial markdowns to meet competition.

Seasonal Pattern in Sales

Seasonal Patterns in Shoe Store Sales, 1980-1983
Percent of Year's Sales by Months

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1983	6.6	6.1	8.4	8.4	8.1	7.9	7.3	8.7	8.7	8.7	9.0	11.9	100.0
1982(r)	7.4	6.6	8.3	9.1	8.3	7.5	7.5	8.6	8.5	8.4	8.5	11.2	100.0
1981	6.9	5.9	7.5	9.3	8.2	7.8	7.4	8.7	8.5	9.0	8.6	12.1	100.0
1980	7.0	6.0	7.8	8.7	8.1	7.5	7.2	9.0	8.6	9.0	9.3	11.7	100.0

(r) revised

Dates of Easter: 1983-April 3; 1982-April 11; 1981-April 19; 1980-April 6.

Source: Based on U.S. Bureau of the Census,
Monthly Retail Sales & Inventories
(BR-13).

Department Stores

Total Department Store Sales, 1980-1983
(Millions of Dollars)

1983	1982(r)	1981(r)	1980	% Change 1983/82	% Change 1982/81	% Change 1981/80
$116,658	$107,863	$103,926	$ 93,345	+ 8.1%	+ 3.8%	+ 11.3%

(r) revised

Source: U.S. Bureau of the Census,
Current Business Reports
(BR-13-80S)

RETAIL TRADE

Department Stores

In the typical department store which had a total volume over $1 million, footwear departments (upstairs store) contributed 4.7% of total store sales in 1982, according to the National Retail Merchants Association. Among stores reporting on women's and misses' shoe departments (upstairs), this department accounted for a median 3.1% of total store sales. Men's footwear accounted for a median 0.9%; juniors' and teens', 0.9%; children's, 0.3%. (Percents do not add to 4.7% as not all stores report on each of the four footwear types. Medians are separately calculated for each shoe type.)

Compared with 1981, footwear sales in the typical department store gained 5.5%. Women's dress and casual shoes had a median increase of 4.4% among reporting stores; men's, up 3.8%.

Department Store Footwear Departments: Selected Operating Ratios, 1982
(Stores With A Total Volume Over $1 Million)
(Median Results -- Upstairs Departments)

	Total All Shoes	Women's & Misses' Dress/Casual Shoes	Juniors' & Teens' Shoes	Men's Footwear	Children's Footwear
(Number reporting)	47	33	29	33	25
Cumulative markon, %	51.3	52.2	51.6	48.7	48.3
Markdowns, % of net sales	19.3	22.1	19.5	14.1	14.7
Gross margin, % of net sales	44.0	43.8	44.9	43.1	43.2
Net sales, % chg. 1982/81	5.5	4.4	10.8	3.8	0.8
Net sales, % of total store	4.7	3.1	0.9	0.7	0.3
Returns, % of gross sales	12.2	13.5	13.5	9.9	nr
$ sales per sq. ft. of selling space	$166.6	$152.6	$228.2	$110.7	$57.9
Stock turns (times)	2.1	2.1	2.5	1.5	1.7

Source: National Retail Merchants Association,
Merchandising & Operating Results, (1983 Edition)

Apparel Specialty Stores

The typical women's wear and family apparel store registered a gain of 3.4% in footwear department business in 1983 compared with 1982, according to the National Retail Merchants Association.

In men's wear stores, according to the Menswear Retailers of America, footwear sales registered a typical increase of 1.7% in stores handling men's/boys' wear only, and a decline of 2.0% in stores that also carry women's wear.

Apparel Specialty Stores

Women's Specialty Stores & Family Clothing Stores: Selected Operating Results For Footwear Departments, 1982

(Total Store Volume Over $1 Million)
(Median Results)

Footwear departments (11*)	
Cumulative markon, %	52.2
Net sales, % of change from 1980	+ 3.4
Net sales, % of total share	8.3
Markdowns, % of net sales	14.7
Gross margin, % of net sales	42.7
Stock turns (times)	1.8

*The number of reporting companies.

Source: National Retail Merchants Association, Merchandising & Operating Results, (1983 Edition).

Men's Wear Stores: Selected Operating Ratios for Men's & Boys' Shoe Departments, 1982

(Median Results)

	% of Total Store Sales	% Change in Sales 1982/1981	Markdowns % of Men's Shoe Sales	Stock Turns Per Year (times)
Men's & boys' shoes:				
In men's wear stores handling men's wear only	5.8% (34)	+1.7% (27)	14.3% (18)	1.3 (17)
In men's wear stores which also sell women's wear	4.4 (53)	-2.0 (45)	8.7 (33)	1.3 (27)

Note: Figures in parentheses cover the number of reporting firms in each ratio.

Source: Menswear Retailers of America Annual Business Survey, June 1982.

ATHLETIC FOOTWEAR MARKET

The U.S. retail market for athletic footwear of all types, valued at over $2 billion, has matured, and the industry can no longer count on the sharp escalation in sales enjoyed in recent years. According to the Census Bureau, apparent consumption of nonrubber athletic footwear represented 11.2% of 1983's total nonrubber footwear consumption, down from 12.5% in 1982.

According to the National Sporting Goods Association, retail sales of athletic footwear reached $2.2 billion in 1983, a 15% gain over 1982. Sales are predicted to soften to a more modest 7% growth rate at the end of 1984, according to NSGA. Much of the increase was due to price increases and to trading up in 1983, as the average price paid for all sport and athletic footwear rose 4% compared with 1983.

ATHLETIC FOOTWEAR MARKET

In terms of pairs, nonrubber athletic footwear consumption (or market supply) was reported at 102.5 million pairs, based on preliminary data for 1983, which represented a gain of less than 1% compared with the 1982 total of 101.6 million pairs.

Based on market tracking studies by Footwear Market Index (FMI), however, total consumer purchases of all types of athletic footwear (including shoes for jogging, tennis, etc.) amounted to 206.4 million pairs, 14.4% over the 1982 total. Preliminary 1983 market projections by this source place total consumption of athletic footwear of the jogging shoe type at 78.4 million pairs, and of tennis shoes/sneakers at 128.0 million pairs.

The NSGA reported a decline in gym shoe/sneaker sales in 1983 for the second consecutive year. Unit sales of basketball shoes, 35%; jogging/running shoes, 24%. Aerobic shoes, surveyed for the first time, showed unit sales of 1.1 million units, sold at an average retail price of $26.50. There was a pick-up in tennis shoe sales, according to the NSGA. Unit sales were up 13% in 1983 following a 2% decline in 1982. Soccer shoes showed the greatest retail price increase in 1983 at 14.3%, followed by racquetball shoes at 8.9% and jogging/running shoes, 7.1%.

Imports represent nearly 70% of total U.S. supply of athletic footwear of all types, according to trade sources. Domestic manufacturers have been helped in meeting this competition through their ability to speedily fill orders and keep up with a fast-changing, demanding market. They are also importing their own brands.

America's involvement in the Summer Olympics in Los Angeles is expected to stimulate volume somewhat, and interest in running seems to still be at a high level, as evidenced by the great number of entrants in marathon races throughout the U.S. In the active area, the growing aerobics trend is a major factor in women's athletic shoe sales. Basketball shoes are reported as strong in the youth market, possibly at the expense of joggers.

However, a big percentage of athletic footwear is purchased for other than active sports participation. FMI data for 1983 indicate that only 25% of athletic footwear purchased for adults in 1983 was primarily for active sports use; among boys and girls, less than 10% of purchases were for active sports. A natural result has been the development of athleisure footwear, which offers an active look plus wanted fashion features. Consumers have cut back on the use of athletic shoes for casual wear and street active, or athleisure footwear, represents the growth market and is becoming the dominant product among athletic footwear suppliers. This is bringing about changes in distribution patterns.

In the spring of 1984, Nike introduced a new line of athleisure footwear which is to be sold in department and family shoe stores rather than Nike's more traditional channels of distribution. As authentic athletic footwear manufacturers add fashion-oriented styling to their lines and mainstream footwear makers broach the athletic market, the parameters of the athleisure footwear category are becoming harder to identify. Definitions are further blurred as specialty athletic footwear stores--which had previously left this business to department stores--get into the market. This is a natural more on their part, as more and more women are going into the athletic footwear stores to buy aerobic shoes, and can then be exposed to athleisure styles.

ATHLETIC FOOTWEAR MARKET

In another development, some manufacturers of athleisurewear (such as Merona) are broadening their lines to include footwear as well as accessories and activewear, to give a total, head-to-toe look which seems to be preferred now by consumers. The footwear is coordinated in color and design with other apparel and accessories.

The multiplicity of buyers involved in buying the different product categories in the large stores, such as department stores, make the promotion of this concept difficult, however, except in specialty operations where one buyer is involved.

The top 10 manufacturers of athletic footwear, based on 1982 sales, were reported as follows:

	Sales (millions of $)
Nike	$ 650.5
Addidas	225.0
Converse	158.5
Bata	100.0
Puma	100.0
Pony	92.0
Keds	82.0
New Balance	70.0
Etonic (including Tretorn sales)	58.0
Envoys	53.0

Source: SportStyle, May 23, 1983.

BUYING HABITS

Footwear purchases are monitored on a regular basis covering four-month periods by FMI (Footwear Market Index), conducted by Kormos & Associates, Nashville, Tenn. Purchase records for each period, covering footwear for men, women, girls, boys, and infants, are obtained through mailings to three demographically balanced panels of 40,000 households each.

Following are findings on shoe types purchased, place of purchase, etc., based on records filed by consumers nationwide in 1983.

FMI Profile of U.S. Men's Footwear Purchases, 1983

Projected total pairs purchased (millions)	205.4
Percent	100.0%
Percent distribution --	
Styles:	
Dress	29.7
Casual	13.6
Work	12.0
Athletic (jogging shoes, etc.)	16.6
Tennis shoes/sneakers	20.3
Western/casual boots	3.4
Other	4.5

(continued)

FMI Profile of U.S. Men's Footwear Purchases, 1983

(continued)

Sale vs. regular price:	
Sale price	46.6%
Regular price	53.4
Average price paid (regular & sale)	$ 37.19
Percent of reported purchases by region:	
Northeast	21.8%
North Central	24.5
South	33.8
West	19.8
Percent of purchases by outlet type:	
Catalog chain	13.9
Department store	8.8
Discount store	17.5
Shoe store	35.2
Sporting goods store/pro shop	7.4
Mail order	3.4
Apparel specialty store	3.2
Factory outlet	3.2
Other	7.4

FMI Profile of U.S. Women's Footwear Purchases, 1983

Projected total pairs purchased (millions)	419.5
Percent	100.0%
Percent distribution --	
Styles:	
Dress	21.0
Pump	19.3
Casual	27.7
Loafers/moccasins	5.5
Work/duty	2.4
Athletic (jogging shoes, etc.)	7.1
Tennis shoes/sneakers	10.2
Boots	4.8
Other	2.0
Sale vs. regular price:	
Sale price	50.9
Regular price	49.1
Average price paid (regular & sale)	$ 25.13
Percent of reported purchases by region:	
Northeast	22.7%
North Central	25.2
South	34.2
West	17.9

(continued)

FMI Profiles of U.S. Women's Footwear Purchases, 1983
(continued)

Percent of purchases by outlet type:	
Catalog chain	10.7%
Department store	16.3
Discount store	14.3
Shoe store	42.4
Sporting goods store/pro shop	2.1
Mail order	2.9
Apparel specialty store	2.8
Factory outlet	5.3
Other	3.2

FMI Profile of U.S. Boys' & Girls' Footwear Purchases, 1983

	Boys' Footwear	Girls' Footwear
Projected total pairs purchased (millions)	54.3	51.1
Percent	100.0%	100.0%
Percent distribution --		
Styles:		
Dress	14.1	21.8
Casual	7.9	29.0
Work	2.1	0.2
Athletic/jogging	18.4	8.8
Tennis shoe/sneaker	49.7	32.4
Boots	5.9	4.0
Other	1.9	3.8
Sale vs. regular price:		
Sale price	46.2	42.8
Regular price	53.8	57.2
Average price paid (regular & sale)	$ 17.83	$ 15.61
Percent of purchases by outlet type:		
Catalog chain	14.8%	12.3%
Department store	7.4	9.6
Apparel specialty store	1.2	1.3
Discount store	26.7	26.3
Shoe store	37.3	41.7
Sporting goods/pro shop	3.8	0.7
Factory outlet	2.1	3.9
Other	6.7	4.2

Source: Kormos & Associates, Nashville, Tenn., Footwear Market Index

BUYING HABITS

Teenage Girls

Every two years Seventeen Magazine conducts a survey among a cross-section of teenagers who are members of their Consumer Panels on fall/winter wardrobes--particularly purchases for going back to school.

The most recent survey was conducted in September 1982. Findings represented a nationwide total of 8,655,000 teenage-female students; projected spending for footwear: $1,004,756,000. 93% of the girls had purchased shoes, 31.9% had purchased boots for back-to-school wear.

Back-To-School Footwear Purchases by Teenage Girls

	No. of Pairs	Expenditures
Projected total (thousands)	31,315	$1,004,756
Percent	100.0%	100.0%
Types of footwear purchased:		
Casuals	25.7	22.6
Dress	20.0	19.7
Sandals/thongs	7.7	4.4
Clogs	2.7	2.3
Jogging shoes	10.3	9.7
Tennis shoes	9.5	8.5
Formal evening	3.1	3.6
Moccasin-type shoes	5.5	4.3
Slippers	2.1	0.8
Boots	12.6	23.4
Other	0.8	0.6

Source: Seventeen's Back-To-School Study, 1983

A Spring Apparel Buying Study was conducted by Seventeen in May 1983, among a cross-section of girls who are members of their Consumer Panel. Projected results showed a total of $1.7 billion spent by teenage girls for footwear, representing 13% of total spring wardrobe expenditures.

Findings on usual place of purchase for footwear, and usual method of payment by the teenage girls were reported as follows:

Usual place of purchase of footwear:	% of girls
Shoe store	81.4%
Department store	20.1
Specialty store	7.0
Discount store	3.8
Mail order	2.0
Other	3.1

(continued)

BUYING HABITS

Teenage Girls

Usual Method of Payment by Teenage Girls For Footwear

Total expenditures	100.0%*
Methods of payment:	
Out of earnings/allowance	45.5
Extra cash from parents	28.1
Parents' charge accounts	28.0
Personal charge accounts	3.0
Other	5.1

* Adds to more than 100% due to multiple responses.

Source: Seventeen's 1983 Spring Apparel Study

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

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RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, $15.00) (July)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label. (September)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Market Research Division
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WOMEN'S, MISSES' & JUNIORS' SPORTSWEAR, CASUAL WEAR, SEPARATES & JEANS

Market Trends

According to the management consulting firm, Kurt Salmon Associates, unit sales of women's wear gained 6% in the twelve month period ended September 1983 compared with the previous twelve months. As the U.S. economy continues its revitalization into 1984, this same firm projects a total 6.5% rise in women's wear, fueled by unit sales of women's sportswear. In the year ended September 1984, non-tailored outerwear (principally activewear) is expected to increase 12%, more than any other women's wear category, on the heels of a 28% gain in the category for the period ended September 1983.

Even more so than in the past, the popularity of an active look combined with fashion constitutes the primary impetus for sportswear sales. The growing emphasis on fashion and designers is particularly noted in the activewear field. In many instances the only difference between authentic activewear and fashion-oriented activewear, dubbed "streetwear," is the amount of functional detailing on the former. Retailers report that while sales of traditional bodywear are as strong as ever, the biggest growth area is in new fashion pieces, for example, the blouson style. The active look has become so pervasive that fabrics associated only with activewear in the past, such as fleece, are increasingly being used in women's traditional sportswear.

Women's jeans is another category which is looking toward fashion for continued growth. As sales of basic five-pocket jeans have weakened over the past year, some of the slack has been taken up by novelty fashion looks, chiefly striped, checked, stonewashed and distressed denim. Analysts believe that the aging of the "baby boom" generation, the heaviest jeans-wearing group, has caused this decline. This age group is now more inclined to wear casual pants in a wide range of styles and fabrications rather than jeans as they search for a new look. A recent report from a major jeans manufacturer forecasts little change in jeans sales following moderate unit increases for 1984.

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census. Results of the most recent census, covering the year 1982, will be available in mid-to-late 1984. During intercensal periods, the Bureau conducts annual surveys using a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity.

According to the 1981 annual survey, the value of shipments in the women's, misses' and juniors' blouses and shirts industry (including primary and secondary products as well as miscellaneous receipts) rose 11.5% to an estimated \$3.0 billion compared with 1980. The estimated 1981 value of shipments in the women's, misses' and juniors' outerwear, not elsewhere classified was \$4.6 billion, 14.7% higher than in 1980.

GENERAL INDUSTRY STATISTICS

Women's, Misses' & Juniors' Blouse Industry (SIC 2331*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments, total**	1,345	1,441	1,502	- 6.7%
With 20 or more employees	874	928	955	- 5.8
Employees, total (thous.)	81.9	84.1	85.1	- 2.6
Production workers (thous.)	70.6	72.6	73.9	- 2.7
Payroll (mil. $)	$ 761.9	$ 716.6	$ 689.2	+ 6.3
Value added by manufacture, (mil. $)#	1,557.0	1,418.9	1,383.5	+ 9.7
Value of industry shipments, (mil. $)##	3,026.8	2,715.5	2,673.1	+ 11.5
Capital expenditures, new (mil. $)	36.8	34.3	32.8	+ 7.3

Women's, Misses' & Juniors' Outerwear, n.e.c. (SIC 2339*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments, total**	1,487	1,585	1,610	- 6.2%
With 20 or more employees	982	1,043	1,036	- 5.8
Employees, total (thous.)	117.5	117.9	109.4	- 0.3
Production workers (thous.)	99.6	102.6	94.6	- 2.9
Payroll (mil. $)	$1,000.9	$ 960.0	$ 827.4	+ 4.3
Value added by manufacture, (mil. $)#	2,418.0	2,004.4	1,679.9	+ 20.6
Value of industry shipments, (mil. $)##	4,582.2	3,994.3	3,399.6	+ 14.7
Capital expenditures, new (mil. $)	50.1	52.4	44.9	- 4.4

Knit Outerwear Mills (SIC 2253*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments, total**	820	876	884	+ 6.4%
With 20 or more employees	442	473	459	- 6.5
Employees, total (thous.)	64.7	67.1	61.9	- 3.6
Production workers (thous.)	55.3	57.9	53.4	- 4.5
Payroll (mil. $)	$ 682.3	$ 637.4	$ 548.1	+ 7.0
Value added by manufacture, (mil. $)#	1,440.7	1,339.1	1,096.0	+ 7.6
Value of industry shipments, (mil. $)##	2,807.8	2,571.7	2,220.8	+ 9.2
Capital expenditures, new (mil. $)	50.0	48.5	35.6	+ 3.1

na = not available
n.e.c. = not elsewhere classified

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2331 comprises establishments primarily engaged in the manufacturing of women's, misses' and juniors' blouses, waists and shirts.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2339 includes manufacturing establishments primarily engaged in the manufacture of women's, misses' and juniors' outerwear, not elsewhere classified, such as neckwear, swimwear, slacks, ski suits, sweaters, and outerwear sport shirts, cut and sewn from purchased woven or knit fabric, also washable service apparel.

SIC 2253 includes establishments making knit outerwear for men and boys, as well as women and children. Separate figures not available as most mills produce for men, women and children.

NOTE: Industry data on manufacturers of women's skirts, pants, pantsuits and jackets is combined in SIC 2337 with data on manufacturers of women's coats and suits. This SIC is covered in the Women's Coats and Suits Fact File.

**Each business location is counted as a separate establishment. Data on number of establishments includes those with paid employees only, as reported in County Business Patterns.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made for or by each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary product shipments alone, plus the value of shipments by manufacturers classified in other industries, is covered on pages

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1979, 1980, 1981.

Between 1972 and 1983, the value of shipments in the women's, misses' and juniors' blouse and shirt industry rose at a compound annual growth rate of 2.3%, as measured in current dollars by the Bureau of Industrial Economics. But the Bureau reports that on a constant 1972 dollar basis, the rate actually decreased 3.5% annually.

Estimated 1983 industry shipments increased 1.3% over 1982 to $3.4 billion, according to this source.

GENERAL INDUSTRY STATISTICS

Estimated Value of Industry Shipments in the Women's, Misses' & Juniors' Blouse & Shirt Industry, 1982, 1983

	Value of Industry Shipments (Mil. $) 1983(e)	Value of Industry Shipments (Mil. $) 1982(e)	% Change 1983/1982	% Change in Constant (1972)$ 1983/1982
Women's, misses' & juniors' blouses & shirts (SIC 2331)	$3,405.0	$3,361.5	+ 1.3%	- 3.6%

Source: Bureau of Industrial Economics, U.S. Industrial Outlook 1984.

In 1983, 549 establishments with at least 20 employees were primarily engaged in the manufacture of women's, misses' and juniors' blouses and shirts. Industry shipments from these establishments were an estimated $3.0 billion, according to Sales & Marketing Management's "Survey of Industrial & Commercial Buying Power".

More than 300 establishments classified in the women's, misses' and juniors' outerwear (not elsewhere classified) industry employ more than 100 persons and account for 68% of the nearly $4.7 billion value of shipments from establishments with 20 or more employees in 1983.

Value of Shipments & Number of Manufacturing Establishments in Specified Women's Sportswear & Separates Industries, 1983

	Number of Establishments		Industry Shipments (Mil. $)	% of Shipments From Plants With 100+ Employees
	With 20+ Employees	With 100+ Employees		
Women's, misses' & juniors' blouse industry (SIC 2331)	549	174	$2,979.1	64
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339)	917	307	4,677.2	68
Knit outerwear mills (SIC 2253)	487	186	2,936.5	78

n.e.c. = not elsewhere classified.

Source: Sales & Marketing Management
Survey of Industrial & Commercial Buying Power
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GENERAL INDUSTRY STATISTICS

Employment & Earnings

During the first quarter of 1984, there were an average of 60.7 thousand persons employed in the women's blouse industry, 1.5% fewer than in the first quarter of 1983. Over the same time period, employment in the women's outerwear, not elsewhere classified, industry gained 6.3% and rose 2.4% in knit outerwear mills.

In all three industries, average weekly pay for production workers increased at a faster rate than employment. Weekly earnings of production workers in the women's blouse industry were 4.5% higher in 1984's first quarter than a year ago. On average, production workers in the women's outerwear, n.e.c. category earned 5.7% more than a year ago and knit outerwear mills production personnel earned 8.5% more.

Employment & Earnings in Selected Women's Sportswear & Separates Industries

	January-April Average		% Change	Annual Average		% Change
	1984	1983	1984/83	1983	1982	1983/82
Women's, misses' & juniors' blouses (SIC 2331):						
All employees (thous.)	60.7	61.6	- 1.5%	62.7	61.8	+ 1.5%
Production workers (thous.)	52.0	52.5	- 0.9	53.3	53.0	+ 0.6
Average weekly earnings	$174.59	$167.00	+ 4.5	$170.38	$162.66	+ 4.7
Average hourly earnings	5.02	4.90	+ 2.4	4.91	4.77	+ 2.9
Average weekly hours	34.8	34.1	+ 2.0	34.7	36.4	- 4.7
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339):						
All employees (thous.)	152.6	143.5	+ 6.3	140.2	138.8	+ 1.0
Production workers (thous.)	128.6	119.6	+ 7.5	117.1	116.2	+ 0.8
Average weekly earnings	$191.14	$180.79	+ 5.7	$181.86	$167.15	+ 8.8
Average hourly earnings	5.21	4.98	+ 4.6	5.08	4.96	+ 2.4
Average weekly hours	36.7	35.5	+ 3.4	35.8	34.1	+ 5.0
Knit outerwear mills (SIC 2253):						
All employees (thous.)	62.8	61.3	+ 2.4	63.6	65.6	- 3.0
Production workers (thous.)	53.9	51.8	+ 4.0	54.3	55.7	- 2.5
Average weekly earnings	$210.65	$194.22	+ 8.5	$204.79	$191.46	+ 7.0
Average hourly earnings	5.61	5.39	+ 4.1	5.52	5.26	+ 4.9
Average weekly hours	37.7	35.8	+ 5.3	37.1	33.7	+10.1

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of Labor Statistics
Employment & Earnings.

GENERAL INDUSTRY STATISTICS

Concentration in Manufacturing

The Women's Sportswear & Separates Industry by Employment Size, 1981

	Establishments		Employees		Annual Payroll	
	Number	% of total	Number (Thous.)	% of total	Mil. $	% of total
Women's, misses' & juniors' blouses (SIC 2331) total	1,345	100.0%	79.8	100.0%	$732.8	100.0%
By establishment size:						
Under 10 employees	271	20.1	1.3	1.6	22.4	3.1
10 to 19 employees	200	14.9	3.3	4.1	35.9	4.9
20 to 49 employees	378	28.1	13.9	17.4	132.9	18.1
50 to 99 employees	289	21.5	21.7	27.2	185.5	25.3
100 or more employees	207	15.4	39.6	49.6	356.1	48.6
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339) total	1,487	100.0%	$101.3	100.0%	$974.3	100.0%
By establishment size:						
Under 10 employees	292	19.6	(D)	--	(D)	--
10 to 19 employees	213	14.3	3.6	3.6	37.2	3.8
20 to 49 employees	431	29.0	15.9	15.7	138.3	14.2
50 to 99 employees	282	19.0	21.1	20.8	191.1	19.6
100 or more employees	269	18.1	(D)	--	(D)	--
Knit outerwear mills (SIC 2253) total	820	100.0%	$ 62.1	100.0%	$698.4	100.0%
By establishment size:						
Under 10 employees	234	28.5	1.1	1.8	24.2	3.5
10 to 19 employees	144	17.6	2.2	3.5	29.4	4.2
20 to 49 employees	211	25.7	7.3	11.8	78.0	11.2
50 to 99 employees	105	12.8	7.6	12.2	76.5	11.0
100 or more employees	126	15.4	43.8	70.5	490.2	70.2

D = Withheld to avoid disclosure.
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
County Business Patterns, 1981.

Manufacturing plants in four states accounted for 65.8% of the total value of shipments in the women's, misses' and juniors' blouse industry in 1978, the latest year for which data has been published. Plants in New York State produced the largest amount of industry shipments, not only in the blouse industry, but also in the outerwear, n.e.c. category and knit outerwear mills industry in 1978.

GENERAL INDUSTRY STATISTICS

Concentration in Manufacturing

Women's, Misses' & Juniors' Sportswear & Separates Industries By Leading States, 1978

	Number of Employees (Thous.)	Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
Women's, misses' & juniors' blouses (SIC 2331)			
U.S. total	73.0	$ 1,202.8	$ 2,333.3
Leading states:			
New York	16.6	238.9	559.2
Pennsylvania	12.1	252.6	449.2
Virginia	7.5	174.4	279.4
North Carolina	8.6	116.4	248.2
Leading states, total	44.8	782.3	1,536.0
% of U.S. total	61.4%	65.0%	65.8%
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339)			
U.S. total	106.4	$ 1,855.0	$ 3,573.1
Leading states:			
New York	23.9	535.4	1,094.9
California	17.5	363.5	699.3
Pennsylvania	8.7	99.4	169.4
North Carolina	5.1	88.4	194.0
Leading states, total	55.2	1,086.7	2,157.6
% of U.S. total	51.9%	58.6%	60.4%
Knit outerwear mills (SIC 2253)			
U.S. total	78.8	1,410.6	2,613.2
Leading states:			
New York	9.5	347.6	715.6
California	10.4	280.9	620.3
Pennsylvania	20.1	270.5	412.4
Virginia	4.1	67.2	98.0
Leading states, total	44.1	966.2	1,846.3
% of U.S. total	56.0%	68.5%	70.6%

n.e.c. = not elsewhere classified.

Source: Based on U.S. Bureau of the Census, Annual Survey of Manufactures, 1978.

PRODUCTION

Annual production figures for women's wear for the year 1983 will be released by the Census Bureau in August. Because of the addition of firms reporting to the Bureau in 1982 for the first time, data for 1981 cannot be compared directly with later years, and only 1982 figures are shown below.

Production of Specified Types of Women's, Misses', Junior Wear, 1982

	Unit of Measure	1982
Women's, misses', junior		
Blouses, shirts, tops		
Knit, incl. sweat shirts	thous. doz.	9,198
Blouses, tops, etc., woven	thous. units	27,845
Skirts	" "	104,430
Jackets	" "	37,249
Vests	" "	2,456
Slacks	thous. doz.	254,973
Sweaters	" "	7,135
Outerwear, not elsewhere classified	" "	4,500

Source: U.S. Bureau of the Census,
Current Industrial Reports (MA23F(82)-1)

Activewear

Production of Women's, Misses' & Juniors' Activewear, 1982

	1982 Production (Thous. Units)	% Change 1982/1981
Athletic shorts, including jogging shorts, tennis shorts, tennis skirts, etc.	1,041	+ 34.6%
Warm-up or jogging suits	1,190	+ 15.3
Swimsuits	3,060	+ 2.3
Woven fabrics	443	na
Knit fabrics	2,043	na
Construction, n.s.k.	574	na
Ski jackets, including ski vests	62	- 40.2
Ski pants	14	+100.0

na = not available
n.s.k. = not specified by kind
* Adjusted for comparability to include firms not reporting in 1981.

Source: U.S. Bureau of the Census,
Women's and Children's Outerwear, MA23F(82)-1

Preliminary estimates on 1983 production of specified types of women's wear have been compiled by the National Cotton Council, and are summarized with a comparison of 1982 figures from this source in the following table.

PRODUCTION

Production of Specified Women's, Misses' & Juniors' Sportswear
By All U.S. Producers, 1983
(In Thousand Dozens)

	1983(p)	% Change 1983/1982
Blouses & shirts	41,409	+ 10.1%
Knit	19,155	+ 12.6
Dress & sport	18,411	+ 12.0
Sweat	744	+ 30.1
Woven	22,254	+ 8.0
Nontailored outer jackets	158	- 10.2
Knit, including fake fur	71	- 10.1
Woven	87	- 10.3
Vests, excluding sweater vests	210	+ 1.0
Knit	139	+ 0.7
Woven	71	+ 1.4
Slacks & non-denim jeans & pants	14,750	+ 8.0
Knit	4,130	+ 0.8
Woven	10,620	+ 11.1
Jeans & dungarees, denim only, woven	8,577	+ 13.0
Shorts & other playgarments, total	2,206	+ 11.2
Knit	1,118	+ 4.1
Shorts, excluding jogging shorts, tennis shorts, etc.	754	+ 6.2
Playsuits, beachtops, halters, etc.	364	--
Woven	1,088	+ 19.6
Shorts, excluding jogging shorts, tennis shorts, etc.	894	+ 24.9
Playsuits, beachtops, halters, etc.	194	--
Active sportswear:		
Warm-up or jogging suits, knit	1,488	+ 25.0
Swimsuits	3,121	--

(p) preliminary

Source: National Cotton Council of America,
Cotton Counts Its Customers, 1984 Edition

PRODUCTION

By Fabric/Construction

The percent distribution of 1982 and 1981 cuttings of women's sportswear by type of fabric and construction is covered in the following table.

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, Construction & Price Line, 1981, 1982

	1982	1981
Separate tailored suit-type jackets	100.0%	100.0%
By construction:		
Woven fabric	55.9	59.1
Knit fabric	31.4	34.6
Not specified	12.6	6.2
By fabric:		
All cotton & chiefly cotton	8.7	10.4
All man-made & chiefly man-made	65.1	65.6
All wool and chiefly wool	14.4	17.6
Other fabric	0.8	0.9
Not specified	11.1	5.5
Nontailored outer jackets, excluding ski	100.0	100.0
By construction:		
Woven fabric	47.4	49.8
Knit fabric	52.6	50.2
Not specified		
By fabric:		
All cotton & chiefly cotton	na	na
All man-made & chiefly man-made	56.9	56.2
All wool & chiefly wool	25.8	14.6
Other fabric	17.3	29.2
Not specified		
Vests, including sweater vests	100.0	100.0
By construction:		
Woven fabric	30.3	25.3
Knit fabric	62.0	63.8
Not specified	7.6	10.9
By fabric:		
All cotton & chiefly cotton	18.5	13.7
All man-made & chiefly man-made	62.7	64.0
All wool & chiefly wool	11.8	12.6
Other fabric		
Not specified	7.0	9.7

(continued)

By Fabric Construction

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, Construction & Price Line, 1981, 1982
(continued)

	1982	1981
Blouses & shirts, except knit outerwear sport shirts (thous. dozen)	100.0%	100.0%
By price (per dozen):		
Under $23.00	2.8	3.2
$23.00 to $38.99	8.1	6.5
$39.00 to $59.99	15.1	17.4
$60.00 & over	58.0	64.1
Not specified	16.0	8.8
By fabric:		
Woven fabric:		
All cotton & chiefly cotton	14.6	13.8
All man-made & chiefly man-made	43.6	47.3
All wool & chiefly wool Other fabric	3.4	3.1
Knit fabric:		
All cotton & chiefly cotton	4.7	4.7
All man-made & chiefly man-made	16.4	20.9
All wool & chiefly wool Other fabric	0.7	1.3
Not specified	16.6	8.9
Knit outerwear sport shirts, except sweater shirts (thous. dozen)	100.0	100.0
All cotton & chiefly cotton	21.1	24.3
All man-made & chiefly man-made	50.0	66.6
All wool & chiefly wool Other fabric	0.5	0.8
Not specified	28.4	8.3
Pullover sweaters (thous. dozen)	100.0	100.0
All cotton & chiefly cotton	18.5	13.4
All man-made & chiefly man-made	62.0	68.4
All wool & chiefly wool	8.8	9.1
Not specified	10.7	9.1
Coat & cardigan sweaters (thous. dozen)	100.0	100.0
All cotton & chiefly cotton	2.1	2.4
All man-made & chiefly man-made	68.9	71.4
All wool & chiefly wool	3.8	4.9
Not specified	25.1	21.3

(continued)

PRODUCTION

By Fabric/Construction

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, Construction & Price Line, 1981, 1982
(continued)

	1982	1981
Skirts	100.0%	100.0%
By construction:		
Woven fabric	59.7	62.4
Knit fabric	24.0	29.2
Not specified	16.2	8.4
By fabric:		
All cotton & chiefly cotton	14.7	15.4
All man-made & chiefly man-made	57.0	61.8
All wool & chiefly wool	13.0	13.8
Other fabric	1.5	0.9
Not specified	13.8	8.1
Slacks, except dungarees & jeans	100.0	100.0
By construction:		
Woven fabric	60.8	65.8
Knit fabric	28.5	29.1
Not specified	10.6	5.1
By fabric:		
All cotton & chiefly cotton	16.7	15.2
All man-made & chiefly man-made	65.8	72.7
All wool & chiefly wool	6.0	5.4
Other fabric	1.0	1.4
Not specified	10.5	5.3
Jeans & dungarees	100.0	100.0
All cotton & chiefly cotton	85.4	87.9
All man-made & chiefly man-made	11.7	11.1
Not specified	2.9	0.9
Shorts, excluding jogging & tennis	100.0	100.0
By construction:		
Woven fabric	43.6	42.5
Knit fabric	43.2	50.5
Not specified	13.2	7.0
By fabric:		
All cotton & chiefly cotton	45.8	44.3
All man-made & chiefly man-made	40.7	48.7
Other fabric	13.5	7.0

PRODUCTION

By Fabric/Construction

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, Construction & Price Line, 1981, 1982

(continued)

	1982	1981
Playsuits, beach tops, halters & other playwear	100.0	100.0
By construction:		
Woven fabric	26.2	33.8
Knit fabric	49.3	49.1
Not specified	24.5	17.0
By fabric:		
All cotton & chiefly cotton	19.9	19.0
All man-made & chiefly man-made	45.9	55.5
Other fabric Not specified	34.2	25.5

na = not available

Source: U.S. Bureau of the Census, Current Industrial Reports
Women's & Children's Outerwear, MA-23F(82)-1.

PRODUCTION

Seasonality of Production

The following table shows the 1983 distribution of production by months in specified types of women's, misses' & juniors' sportswear, as reported in the Census Bureau's monthly survey.

Monthly Distribution of Reported Cuttings of Selected Women's Sportswear, 1983

	Tailored Separate Jackets	Skirts	Slacks*	Blouses	Knit Outerwear Sport Shirts	Sweaters**
Total Year	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	7.9	8.0	8.7	7.0	9.2	7.2
February	7.7	7.8	9.4	8.0	10.6	6.6
March	8.7	9.1	9.4	8.4	10.8	6.6
April	7.8	7.9	8.6	8.0	8.5	5.8
May	7.6	8.2	8.7	8.9	8.0	6.2
June	8.3	8.6	8.8	9.6	7.3	8.3
July	7.2	7.9	7.7	7.7	5.5	9.2
August	9.7	9.7	8.7	8.8	7.3	10.4
September	9.5	9.0	8.5	8.7	7.6	10.1
October	10.0	8.6	7.7	9.4	8.3	10.3
November	7.9	7.9	7.5	8.2	8.9	10.6
December	7.8	7.3	6.3	7.4	8.0	8.6

* Includes jeans and dungarees, and jean-cut casual slacks

**Shipments.

Source: U.S. Bureau of the Census, Current Industrial Reports Men's, Women's, Misses' & Juniors' Selected Apparel M23I(84)-1.

SHIPMENTS

Information on value of shipments of women's wear in 1983 is not available. U.S. Census Bureau data currently available indicates that the value of shipments of women's blouses and shirts, except knit outerwear sport shirts, in 1982 was off a slight 0.4% compared with the year before. The value of shipments of women's slacks, excluding jeans and dungarees, rose 3.2% while shipments of women's jeans and dungarees decreased 7.9% in value.

With the exception of women's ski jackets, which fell 14.8%, the value of shipments of women's active sportswear items increased at a rapid pace in 1982. For example, athletic shorts were up 18.5%, warm-up suits rose 9.9% and ski pants increased a hefty 79.3%

Value of Shipments of Reported Women's, Misses' & Juniors' Sportswear & Separates Categories, 1982

	Value of Shipments (Mil. $)	Adjusted % Change 1982/1981
Tops:		
Blouses & shirts, except knit outerwear sport shirts	2,562.4	- 0.4%
Knit outerwear sport shirts	610.5	- 3.5
Sweaters	482.1	- 0.6
Pullovers	370.2	na
Cardigans & coat-type	73.4	na
Separate tailored suit-type jackets	836.1	- 0.8
Nontailored outer jackets, exc. ski jackets	74.0	+ 5.0
Vests, exc. sweater vests	25.5	+ 5.0
Bottoms:		
Skirts	1,247.5	+ 3.9
Slacks, exc. jeans & dungarees	1,667.6	+ 3.2
Jeans & dungarees	1,002.4	- 7.9
Active Sportswear:		
Athletic shorts, exc. jogging shorts, tennis shorts, tennis skirts, etc.	60.2	+18.5
Warm-up or jogging suits	89.0	+ 9.9
Swimsuits	394.6	+ 5.8
Ski jackets	32.4	-14.8
Ski pants	5.4	+79.3
Playgarments:		
Shorts, exc. tennis & jogging	68.2	+ 7.5
Playsuits, beach tops, halters, & other playwear	40.5	+15.5
Team sports uniforms	16.1	na

na = not available

Source: U.S. Bureau of the Census
Current Industrial Reports,
Women's & Children's Outerwear MA-23F(82)-1.

SHIPMENTS

Leading U.S. Manufacturers of Specified Active Sportswear, 1982
(Including both men's & women's wear)

Tennis & Golf Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Robert Bruce	$ 60.0
Munsingwear	40.0
Jockey	33.0
Loomtogs/Fred Perry	23.5
Difini	16.0
Fila*	15.0
Newcombe Active Sportswear	12.5(e)

General Activewear

Leading Manufacturers	1982 Sales (Mil. $)
Izod	$ 450.0(e)
Bassett-Walker	240.0(e)
Tultex	231.4
Sale Knitting	210.0(e)
Jantzen	165.0(e)
Ocean Pacific	144.0
Catalina	105.0(e)

Ski Apparel

Leading Maufacturers	1982 Sales (Mil. $)
Head**	$ 34.0(e)
Sport-Obermeyer	20.0
CB Sports	16.5
Roffe	13.0(e)
Skyr	10.1

Outdoor Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Woolrich	$ 106.6
Pacific Trail	63.1
Jan Sport	28.0
The North Face	22.0
Patagonia	15.0(e)

Bodywear/Exercise Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Danskin	$ 100.0(e)
Flexatard	22.0
Carushka	13.0
West Grove	9.0(e)

Athletic Footwear Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Adidas	$ 140.0(e)
Nike	96.9
Etonic	8.0(e)
New Balance	8.0(e)

Competitive Runningwear

Leading Manufacturers	1982 Sales (Mil. $)
Dolfin	$ 12.5
Sub-4	8.0
Bill Rodgers & Co.	6.5
Frank Shorter	3.1
Women on the Run	3.0

Competitive Swimwear

Leading Manufacturers	1982 Sales (Mil. $)
Speedo	30.0
Arena	10.0
The Finals	3.2(e)
Hind Wells	2.5
Ocean Pool	1.5(e)
Gulbenkian	1.5(e)

(e) = estimated

* Also includes skiwear & swimwear

**Also includes Head swimwear, tenniswear, runningwear & Tyrolia skiwear.

Source: SportStyle May 23, 1983

PRODUCER PRICE INDEXES

While the producer price index covering all apparel went up only 2.3% between March 1983 and March 1984, factory prices of women's separates increased at a higher rate. A prime example is women's blouses and shirts, which showed a 9.1% rise in manufacturer's prices over this twelve-month period. Similarly, skirt prices climbed 5.6%.

Producer (Factory) Price Indexes for Selected Types of Women's Sportswear & Separates, December, March 1984/1983
(1967 = 100 unless otherwise specified)

	March		December		% Change
	1984(p)	1983	1984	1983	March 1984/1983
All commodities	311.1	300.6	306.0	300.6	+ 3.5%
All apparel	200.7	196.1	198.4	191.7	+ 2.3
Women's apparel	179.8	175.3	177.8	169.1	+ 2.6
Skirts, including uniform (12/77 = 100)	126.4	119.7	125.3	117.1	+ 5.6
Slacks (6/83 = 100)	95.1	na	98.8	na	--
Blouses & shirts, except knit, sport & sweat shirts (12/77 = 100)	143.6	131.6	136.3	na	+ 9.1
Separate tailored suit-type jackets (12/77 = 100)	115.0	116.1	115.0	na	- 0.9

na = not available

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

Imports of women's, misses' and juniors' blouses and shirts grew at a compound annual rate of 19.1% between 1972 and 1983 to a value of $1.5 billion, according to the U.S. Bureau of Industrial Economics. In units, imports accounted for approximately 27% of apparent consumption (domestic production plus imports minus exports) of blouses and shirts in 1983.

The U.S. foreign trade deficit in apparel continued to widen in 1983. For every dollars worth of apparel exported in 1983, nearly $14 dollars worth was imported. Women's and children's sportswear imports were valued at $3.4 billion, a 24.6% increase over the 1982 value. The quantity imported rose 20.4% to more than 67 million dozen.

FOREIGN TRADE

Imports

Summary of U.S. Imports of Women's & Children's Sportswear & Separates, 1982, 1983

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Total, all reported categories	67,460.5	56,037.3	+ 20.4%	$3,359,292	$2,696,958	+ 24.6%
Blouses & shirts, total	34,903.4	29,164.3	+ 19.7	1,485,965	1,174,985	+ 26.5
Blouses	16,037.4	12,840.5	+ 24.9	898,476	721,185	+ 24.6
Not knit	15,480.9	12,419.7	+ 24.7	852,121	688,438	+ 23.8
Cotton	8,566.9	6,851.8	+ 25.0	396,497	330,731	+ 19.9
Wool or man-made	6,415.8	5,243.8	+ 22.4	367,715	292,906	+ 25.5
Silk	498.2	324.1	+ 53.7	87,909	64,846	+ 36.5
Knit, wool	556.5	420.8	+ 32.2	46,355	32,702	+ 41.7
Shirts, knit						
Cotton or man-made	18,866.0	15,903.0	+ 18.6	587,489	453,800	+ 29.5
Sweaters, knit	11,440.7	9,768.1	+ 17.1	721,959	613,539	+ 17.7
Cashmere, wholly or part	55.9	39.0	+ 43.3	21,577	15,932	+ 35.4
Sheep-like hair	164.8	130.9	+ 25.9	21,589	15,338	+ 40.8
Wool	1,663.6	1,386.4	+ 20.0	164,502	134,787	+ 22.0
Man-made	8,895.7	7,601.1	+ 17.0	448,441	393,753	+ 13.9
Cotton	660.7	610.7	+ 8.2	65,850	53,729	+ 22.6
Pants, slacks & shorts	16,874.5	13,695.4	+ 23.2	911,593	727,061	+ 25.4
Not knit						
Cotton	11,486.7	7,753.9	+ 48.1	665,403	490,754	+ 35.6
Wool	173.8	117.5	+ 47.9	32,109	21,358	+ 50.3
Man-made	5,151.9	5,761.9	- 10.6	203,998	204,914	- 0.4
Silk	62.1	62.1	--	10,083	10,035	+ 0.5
Skirts	3,036.3	1,943.8	+ 56.2	205,597	140,346	+ 46.5
Not knit	2,574.1	1,654.6	+ 55.6	185,204	124,310	+ 49.0
Wool	212.2	109.4	+ 94.0	35,365	22,458	+ 57.5
Man-made	821.7	381.9	+115.1	55,888	27,308	+104.7
Cotton	1,540.2	1,163.3	+ 32.4	93,951	74,544	+ 26.0
Knit	462.2	289.2	+ 59.8	20,393	16,036	+ 27.2
Wool	31.0	21.7	+ 42.9	5,140	3,523	+ 45.9
Cotton or man-made	431.2	267.5	+ 61.2	15,253	12,513	+ 21.9
Playsuits						
Not knit						
Cotton	1,205.6	1,465.7	- 17.7	34,178	40,977	- 16.6

*The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135, December
1982, 1983.

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear & Separates by Leading Country of Origin, 1982, 1983

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Blouses, cotton, not knit total	8,566.9	6,851.8	+ 25.0%	$396,497	$330,731	+ 19.9%
India	2,624.6	1,801.6	+ 45.7	103,401	74,363	+ 39.0
Hong Kong	2,524.2	2,495.0	+ 1.2	142,969	144,586	- 1.1
Mainland China	670.3	471.9	+ 42.0	25,214	17,008	+ 48.2
Blouses, wool or man-made not knit, total	6,415.8	5,243.8	+ 22.4	367,715	292,906	+ 25.5
Mainland China	1,212.6	956.8	+ 26.7	52,182	36,008	+ 44.9
Korea	1,041.2	992.0	+ 5.0	65,924	56,523	+ 16.6
Hong Kong	861.1	660.4	+ 30.4	66,181	55,244	+ 19.8
Blouses, silk, not knit total	498.2	324.1	+ 53.7	87,909	64,846	+ 35.6
Hong Kong	336.2	221.9	+ 51.5	53,279	39,379	+ 35.3
Korea	66.6	55.0	+ 21.1	14,279	11,551	+ 23.6
Mainland China	62.2	19.9	+212.6	6,897	2,390	+188.6
Blouses, wool, knit, total	556.5	420.8	+ 32.2	46,355	32,702	+ 41.7
Hong Kong	497.6	387.2	+ 28.5	42,250	30,148	+ 40.1
Mainland China	21.7	5.0	+334.0	947	249	+280.3
Korea	20.8	16.3	+ 27.6	1,379	1,066	+ 29.4
Shirts, cotton or man-made knit, total	18,866.0	15,903.0	+ 18.6	587,489	453,800	+ 29.5
Taiwan	4,736.0	4,133.5	+ 14.6	155,330	124,955	+ 24.3
Korea	3,627.9	2,836.7	+ 27.9	117,457	83,270	+ 41.1
Hong Kong	3,040.3	2,768.8	+ 9.8	103,258	92,565	+ 11.6
Sweaters, cashmere, knit total	55.9	39.0	+ 43.3	21,577	15,932	+ 35.4
Hong Kong	22.6	26.6	- 15.0	8,004	9,530	- 16.0
Mainland China	15.2	1.7	+794.0	4,362	553	+688.8
United Kingdom	9.3	5.5	+ 69.1	5,094	3,370	+ 51.2
Sweaters, sheep-like hair, knit, total	164.8	130.9	+ 25.9	21,589	15,338	+ 40.8
Hong Kong	84.4	71.6	+ 17.9	10,985	8,468	+ 29.7
Mainland China	22.5	21.3	+ 5.6	1,715	1,635	+ 4.9
Italy	15.3	10.3	+ 48.5	2,727	1,613	+ 69.1
Sweaters, wool, knit, total	1,663.8	1,386.4	+ 20.0	164,502	134,787	+ 22.0
Hong Kong	789.8	753.7	+ 4.8	81,194	73,824	+ 10.0
Mainland China	211.5	187.5	+ 12.8	13,406	11,855	+ 13.1
Sri Lanka	101.2	41.1	+146.2	5,816	2,413	+141.0

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear & Separates by Leading Country of Origin, 1982, 1983
(continued)

	Quantity (Thous. Doz.) 1983	Quantity (Thous. Doz.) 1982	% Change 1983/1982	Value C.I.F.* (Thous. $) 1983	Value C.I.F.* (Thous. $) 1982	% Change 1983/1982
Sweaters, man-made, knit total	8,895.7	7,601.1	+ 17.1%	$448,441	$393,753	+ 13.9%
Taiwan	3,705.9	3,012.9	+ 23.0	207,857	178,318	+ 16.6
Korea	2,813.3	2,396.3	+ 17.4	131,219	116,755	+ 12.4
Hong Kong	1,106.5	1,006.2	+ 10.0	64,020	56,422	+ 13.5
Sweaters, cotton, knit total	660.7	610.7	+ 8.2	65,850	53,729	+ 22.6
Hong Kong	272.1	307.4	- 11.5	30,167	29,158	+ 3.5
Taiwan	79.2	44.4	+ 78.4	6,747	3,526	+ 91.3
Korea	61.1	49.3	+ 23.9	5,066	3,818	+ 32.7
Pants, slacks & shorts, cotton, not knit, total	11,486.7	7,753.9	+ 48.1	665,403	490,754	+ 35.6
Hong Kong	4,647.9	3,352.7	+ 38.6	311,571	241,134	+ 29.2
Mainland China	1,812.8	695.2	+160.8	74,442	35,476	+109.8
Japan	1,264.8	997.9	+ 26.7	75,963	60,136	+ 26.3
Pants, slacks & shorts, wool, not knit, total	173.8	117.5	+ 47.9	32,109	21,358	+ 50.3
Hong Kong	36.6	28.9	+ 26.6	7,040	4,970	+ 41.6
Japan	20.2	27.9	- 27.6	3,758	3,720	+ 1.0
Italy	19.9	7.7	+158.4	5,511	3,417	+ 61.3
Pants, slacks & shorts, man-made, not knit, total	5,152.0	5,761.9	- 10.6	203,988	204,914	- 0.5
Taiwan	2,548.6	2,234.9	+ 14.0	113,668	94,910	+ 19.8
Mainland China	884.3	1,721.8	- 48.6	18,990	37,139	- 48.9
Hong Kong	476.2	553.8	- 14.0	19,840	24,260	- 18.2
Pants, slacks & shorts, silk, not knit, total	62.1	62.1	--	10,083	10,035	+ 0.5
Hong Kong	47.0	40.6	+ 15.8	7,534	6,608	+ 14.0
Mainland China	7.0	14.1	- 50.4	647	1,352	- 52.1
Korea	2.4	2.7	- 11.1	628	700	- 10.3
Skirts, cotton, not knit, total	1,540.2	1,163.3	+ 32.4	93,951	74,544	+ 26.0
Hong Kong	436.1	325.5	+ 34.0	30,891	29,975	+ 3.1
India	333.1	304.5	+ 9.4	18,151	17,255	+ 5.2
Mainland China	197.5	98.4	+100.7	7,537	4,152	+ 81.5

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear & Separates by Leading Country of Origin, 1982, 1983
(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Skirts, man-made, not knit total	821.7	381.9	+115.1	$55,888	$27,308	+104.7%
Taiwan	348.9	147.6	+136.4	21,602	8,560	+152.4
Hong Kong	92.2	63.2	+ 45.9	8,489	7,027	+ 20.8
India	68.9	24.7	+178.9	4,284	1,663	+157.6
Skirts, wool, not knit total	212.2	109.4	+ 94.0	35,365	22,458	+ 57.5
Hong Kong	47.0	30.2	+ 55.7	6,629	6,354	+ 4.3
Korea	32.9	14.8	+122.3	4,730	2,091	+126.2
Mainland China	26.9	5.7	+371.9	2,871	588	+388.3
Skirts, wool, knit, total	31.0	21.7	+ 42.9	5,140	3,523	+ 45.9
Hong Kong	14.2	16.2	- 12.3	1,720	2,062	- 16.6
Mainland China	4.6	na	na	513	na	na
Italy	2.5	0.9	+177.8	830	404	+105.4
Skirts, cotton or man-made knit, total	431.2	267.5	+ 61.2	15,253	12,513	+ 21.9
Taiwan	243.1	143.8	+ 69.1	5,689	4,601	+ 23.6
Hong Kong	86.5	72.3	+ 19.6	4,689	4,283	+ 9.5
Korea	22.5	11.7	+ 92.3	821	473	+ 73.6
Playsuits, cotton, not knit, total	1,205.6	1,465.7	- 17.7	34,178	40,977	- 16.6
Mainland China	557.5	647.3	- 13.9	13,562	15,490	- 12.4
Hong Kong	203.2	312.7	- 35.0	6,472	10,019	- 35.4
Philippines	183.6	230.7	- 20.4	4,896	6,141	- 20.3

na = not available

* The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports,
FT 135 December 1982, 1983.

FOREIGN TRADE

Exports

Exports of women's and children's sportswear in 1983 rose a bare 2.5% in value to $62.8 million despite an 11.5% jump in the quantity exported, due largely to the unfavorable exchange rate of the dollar. The export value of women's, misses' and juniors' blouses and shirts, according to the U.S. Bureau of Industrial Economics, totaled about $32.6 million in 1983, 8.7% above the previous year.

From 1972 through 1983, exports of women's, misses' and juniors' blouses and shirts increased in value at a 25.0% compound annual rate. Exports as a percentage of domestic shipments equaled 1.2% in this category.

Summary of Exports of Women's & Children's Sportswear & Separates, 1982, 1983

	Quantity (Thous. Doz.)		% Change	Value F.A.S.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Total, all reported categories	2,344.3	2,102.8	+ 11.5%	$62,820	$61,284	+ 2.5%
Pants, slacks & shorts, total	719.5	738.3	- 2.5	19,233	20,152	- 4.6
Not knit	343.5	421.7	- 18.5	12,461	13,565	- 8.1
Denim, of cotton	34.0	48.3	- 29.6	1,412	2,233	- 36.8
Cotton, other than denim	76.1	141.5	- 46.2	2,983	5,152	+ 42.1
Wool	20.2	4.8	+320.8	1,803	310	+481.6
Man-made	187.0	211.4	- 11.5	4,901	7,151	- 31.5
Other	26.2	15.7	+ 66.9	1,362	952	+ 43.1
Knit	376.0	316.6	+ 18.8	6,772	6,587	+ 2.9
Cotton	80.7	47.7	+ 69.2	2,010	1,768	+ 13.7
Wool	125.7	77.6	+ 62.0	999	377	+165.0
Man-made	72.8	88.2	- 17.5	1,351	2,250	- 40.0
Other	96.8	103.1	- 6.1	2,412	2,192	+ 10.0
Skirts, total	108.3	130.4	- 16.9	5,251	6,859	- 23.4
Not knit	62.7	75.3	- 16.7	3,345	4,703	- 28.9
Wool	2.8	8.3	- 66.3	155	472	- 67.2
Cotton	34.4	31.4	+ 9.5	1,832	1,649	+ 11.1
Man-made	23.3	31.9	- 27.0	1,199	2,273	- 47.2
Other	2.2	3.7	- 40.5	159	309	- 48.5
Knit	45.6	55.1	- 17.2	1,906	2,156	- 11.6
Wool	1.1	2.6	- 57.7	123	246	- 50.0
Cotton	16.0	24.3	- 34.2	411	693	- 40.7
Man-made	10.1	24.0	- 57.9	386	935	- 58.7
Other	18.4	4.2	+338.1	986	282	+249.6
Blouses & shirts, total	1,475.8	1,200.7	+ 22.9	36,782	32,874	+ 11.9
Knit	432.6	401.9	+ 7.6	10,908	12,813	- 14.9
Cotton	140.2	146.3	- 4.2	3,712	5,366	- 30.8
Wool	23.2	9.5	+144.2	676	435	+ 55.4
Man-made	232.9	203.2	+ 14.6	5,652	5,945	- 4.9
Other	36.3	42.9	- 15.4	868	1,067	- 18.6

(continued)

FOREIGN TRADE

Exports

Summary of Exports of Women's & Children's Sportswear & Separates, 1982, 1983
(continued)

	Quantity (Thous. Doz.)		% Change	Value F.A.S.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Blouses (continued)						
Not knit	1,043.2	798.8	+ 30.6%	$25,874	$20,061	+ 29.0%
Cotton	81.9	113.2	- 27.6	2,484	3,322	- 25.2
Wool	1.8	5.2	- 65.4	98	252	- 61.1
Man-made	280.5	244.8	+ 14.6	6,532	6,587	- 0.8
Other	679.0	435.6	+ 55.9	16,760	9,900	+ 69.3
Sweaters, total	40.7	33.4	+ 21.8	1,554	1,399	+ 11.1
Knit						
Wool	7.0	5.6	+ 25.0	367	239	+ 53.6
Cotton	24.7	18.1	+ 36.5	796	509	+ 56.4
Man-made	9.0	9.7	- 7.2	391	651	- 40.0

* The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of exportation, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports FT 410, December 1982, 1983

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The following table shows the demographic impact of the aging of the "baby boom" generation. Between 1983 and 1990, females in the 35-44 year old age bracket will increase 27.9%, while those aged 20-24 years will decrease by 15.3%, according to Census Bureau projections.

By the year 2000, women aged 45-54 years will zoom 64.3% in numbers, surpassing the 46.4% growth in the 35-44 years old category. At the same time, the number of females 15-24 years of age will shrink by 12.4%.

THE POTENTIAL MARKET

Estimated Female Population of the U.S., 1983 & Projections to 2000*

(Numbers in thousands) (Including Armed Forces overseas)

	1983	1990	2000	% Change 1990/1983	% Change 2000/1983
Total all ages	120,209	128,139	137,464	+ 6.6%	+ 14.3%
Under 15 years	25,195	26,658	27,295	+ 5.8	+ 8.3
15 years & older	95,014	101,479	110,169	+ 6.8	+ 15.9
15 - 19 years	9,395	8,299	9,262	- 11.7	- 1.4
20 - 24 years	10,785	9,137	8,422	- 15.3	- 21.9
25 - 34 years	20,147	21,637	18,031	+ 7.4	- 10.5
35 - 44 years	14,940	19,116	21,877	+ 27.9	+ 46.4
45 - 54 years	11,516	13,051	18,923	+ 13.3	+ 64.3
55 - 64 years	11,828	11,180	12,495	- 5.5	+ 5.6
65 years & over	16,403	19,059	21,159	+ 16.2	+ 29.0
Median age	32.1	34.2	37.7		

* Middle series projections reflect the middle assumptions about future levels of fertility, mortality and net migration.

Source: U.S. Bureau of the Census
Current Population Reports,
P-25, No. 952 (May 1984).

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Some 12 million women in the U.S. population are likely candidates for petite sizes, while another eight million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships, While there are 40 million women in the U.S. who are five feet three inches or shorter most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

Research conducted by Associated Merchandising Corp., a major department store operator, grouped American women into average size ranges. Four out of 10 wore junior sizes, 36% wore misses, 13% were in the petite size range and 11% were classified as large or half size wearers.

THE POTENTIAL MARKET

Estimated Number of Women 18-64 Years of Age
By Height & Weight, 1983
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	73,004	100.0%	16,572	22.7%	32,414	44.4%	24,018	32.9%
Height:								
5'3" or less	39,860	54.6	11,973	16.4	16,644	22.8	11,243	15.4
5'4" - 5'6"	26,354	36.1	4,234	5.8	12,411	17.0	9,709	13.3
5'7" or more	6,790	9.3	365	0.5	3,358	4.6	3,066	4.2

Source: Fairchild Market Research Department based on National Health Survey (U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census population projections for 1983 by age.

RETAIL SALES

According to the Bureau of Economic Analysis, personal consumption expenditures--which measures the value at retail of all goods reaching the consumer through any channel, including direct sales by manufacturers and wholesalers, premiums, etc.--of women's and children's wear reached $68.7 billion in 1983. This was 5.9% higher than in 1982 but lower than the overall 8.3% rise in personal consumption expenditures for 1983.

Personal Consumption Expenditures
For Women's & Children's Wear, 1980 - 1983
(Billions of $)

	1983	1982	1981	1980	% Change 1983/82	% Change 1983/80
Personal consumption expenditures, total (goods & services)	$2,158.0	$1,991.9	$1,857.2	$1,668.1	+ 8.3%	+29.4%
Women's & children's wear (except footwear), total	68.7	64.9	62.8	56.9	+ 5.9	+20.7
% of total personal consumption expenditures	3.2%	3.3%	3.4%	3.4%		

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

Personal consumption expenditures for women's, misses' and junior wear in 1983 are estimated at about $55 billion. Sales through retail outlets alone, are approximately $47-to-$49 billion. The share accounted for by the broad category, sportswear, casual wear, separates and jeans, can only be roughly estimated, and is believed to be in the area of 15% to 20% of the total.

RETAIL SALES

A more complete evaluation of the market will be available when the reports on the 1982 Census of Retail Trade are released by the U.S. Bureau of the Census. Preliminary reports (subject to revision) have been released on a few of the store types selling women's separates, etc. Including activewear for women, sales of sportswear and separates in women's ready-to-wear stores have gone up about 59% since the last previous Census covering 1977. This is in current dollars, and inflation of course accounts for much of the increase.

In family clothing stores sales rose 128.5% from 1977 to 1982. In sporting goods stores sales of women's and girls' wear were up 196%.

Findings for department store results in 1982 have not been released yet by the Census Bureau. However, the section on Retail Sales By Store Type includes typical operating ratios for department stores in women's sportswear and separates categories.

Women's Jeans

Beginning in 1982, sales of the basic five-pocket jean, the industry's staple, have slowed. Overall, women's and children's jean sales declined to 217 million units in 1982, 13.9% less than in 1981 and the first sales drop since 1973. Industry sources indicated that the decline might signal that the saturation point has been reached in the now-mature jeans industry. Older, "baby-boom" customers are wearing more casual pants and activewear looks and reducing their jeans purchases. According to a recent Associated Merchandising Corp. survey, 58% of women are looking to buy pants other than jeans.

However, in 1983, women's and children's jeans sales rose 4.1% to 226 million units. Instrumental to the gain were sales of so-called novelty looks--variations on the basic jeans theme. These included striped, checked, stonewashed and distressed denim and new silhouettes, such as capri and cigaret leg jeans. Some analysts expect "proportionately-sized" jeans, which offer a more specialized fit, to account for a larger share of women's jeans sales in the near future. Despite the abundance of different jeans looks, a major jeans manufacturer forecasts a flat demand for jeans starting in 1985.

Women's Activewear

According to an in-depth study of sports in America, women are rapidly catching up to men in their participation in sports activity. Nearly four out of 10 women aged 15 and over in the nationally representative survey participated in five or more different sports regularly (at least once a month, in season) in 1982. The most popular activities for women were swimming (47% of women), jogging and bicycling (38% each), calisthenics (32%) and racquet sports and areobic dancing (25% each).

Almost half (49%) of women surveyed expressed an interest in watching at least five different sports. This type of interest can be translated into non-functional activewear sales, called the "street-active" look.

RETAIL SALES

Women's Activewear

Female Participation in Sports, 1982
(Percent of Women Aged 15 & over)

	Participation Once a Month or More
Swimming	47%
Calisthenics	32
Jogging	38
Bicycling	38
Softball/baseball	22
Bowling	20
Weightlifting	10
Basketball	15
Football/rugby	8
Tennis, racquet sports	25
Pool	14
Boating	22
Table tennis	14
Volleyball	16
Skiing	10
Golf	8
Gymnastics	15
Soccer	6
Handball	3
Wrestling	3
Hoseback riding	8
Archery	3
Fencing	2
Aerobic dancing	25
Lacrosse	1
Hockey	1
Other team sports	4

Source: Miller Lite Report on American Attitudes Towards Sports, 1983. (Miller Brewing Co., Milwaukee, WI.)

In today's activewear market, fashion, fit and a designer or celebrity name are needed for success. Increased competition among an expanding pool of activewear manufacturers, including many traditional sportswear houses, has led to a more fashion-oriented approach to activewear. Career women and active women are particularly inclined to view active apparel as a fashion statement. To capture the fashion market, one of the newest merchandising wrinkle is to present a total head-to-toe look from a single manufacturer, thereby helping the consumer to coordinate her active wardrobe.

RETAIL SALES

Activewear

As the appeal of activewear grows for the masses, more sporting goods stores are expanding their apparel sections. For example, bodywear and accessories (leg warmers, belts, stirrup tights, etc.)--a $600 million category in 1983, according to trade estimates--can now be found in many sports outlets. These retailers recognize the need to cater to their customer's multi-sport, total body fitness interest. And the trend towards activewear shows no sign of abating among the young. A recent survey conducted by Teen Age Research Unlimited found that fully 43% of teenage girls nationwide bought athletic apparel in the last quarter of 1983 alone.

About 52 million swimsuits were sold in the U.S. in 1982 and dollar sales were up 2%; in 1983, sales in dollars increased 4% to $823 million. According to a study reported by the Newspaper Advertising Bureau, women aged 25-39 account for 50% of swimwear sales. The addition of new fabrics, skinnier straps and bold colors has brought swimwear out of the water and into the street, accounting for some of the sales rise. Competitive swimwear, because of its characteristic high front and cross back, is being worn as a top with jeans and shorts.

Activewear sales should gain momentum due to the televised Summer Olympics in 1984 as well as the feeling that fitness is no longer a fad but a part of the new American lifestyle.

Activewear sales projections for the 1982 and 1983 seasons (October-September) have been compiled by the National Sporting Goods Association, through a nationally-representative survey of 80,000 households. Based on these projections, following are estimates on the size of the women's activewear market. Swimwear accounted for almost half (47.7%) of the estimated $1.7 billion market.

Estimated Retail Sales of Women's Activewear, 1982, 1983

	October-September		% Change
	1983(e)	1982(e)	1983/1982
Swimwear	$ 823.2	$ 791.4	+ 4.0%
Golf clothing	53.5	51.0	+ 4.9
Down & fiberfilled parkas	93.5	91.7	+ 2.0
Elastic waist shorts	193.0	174.5	+ 10.6
Skiwear	122.0	115.9	+ 5.3
Sweatshirts	114.9	102.6	+ 12.0
Tennis clothing	60.4	57.6	+ 4.9
Down & fiberfilled vests	50.2	50.0	+ 0.4
Warm-up suits	214.5	210.3	+ 2.0
Total women's activewear sales	1,725.2	1,645.0	+ 4.9

(e) estimated

Source: Fairchild Market Research Department based on National Sporting Goods Association, The Sporting Goods Market in 1982, 1983.

RETAIL SALES BY STORE TYPE

Department Stores

Selected Typical (Median) 1982 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Total Upstairs Store (103)*	All Adult Female Apparel (101)*	All Adult Female Sportswear (97)*	Junior Spectator Sportswear (39)*	Junior Active Sportswear (37)*	Women's & Misses' Spectator Sportswear (48)*	Women's & Misses' Active Sportswear (47)*	All Adult Female Jackets & All-Weather Coats (56)*
Net sales, % change from last year	+ 3.8%	+ 3.6%	+ 4.9%	- 5.9%	+ 42.2%	+ 3.7%	+ 9.1%	+ 5.7%
Sales, % of merchandise division	--	100.0	32.7	12.0	1.9	46.8	4.7	1.7
Sales, % to total store sales	90.7	24.7	13.4	2.6	0.4	10.2	1.1	0.7
$ sales per sq. ft. of selling space	$109.0	$133.0	$138.5	$117.2	$ 83.6	$167.3	$158.8	$175.6
Cumulative markon, %	48.4%	51.3%	51.5%	52.0%	52.3%	51.4%	52.0%	50.9%
Gross margin, % of sales incl. cash discounts	41.9	43.1	44.0	45.7	47.7	44.4	47.0	44.0
Markdowns, retail, % of sales	14.4	22.3	21.2	22.4	18.1	22.1	15.7	21.4
Returns, % of sales	8.5	11.6	11.0	11.5	6.8	13.2	9.0	12.1
Sales promotions, % of sales	3.1	3.3	2.7	4.3	3.3	3.7	2.8	3.8
Salespeople's salaries % of sales	7.8	7.2	7.2	5.6	4.9	7.3	6.0	6.4
Number of stock turns	2.7	3.8	4.0	4.6	4.0	4.0	3.8	3.8

*Number in parentheses refers to the number of firms reporting in each category.

Source: National Retail Merchants Association,
"Merchandising & Operating Results of 1982" -
1983 Edition.

RETAIL SALES BY STORE TYPE

Women's Ready-To-Wear Stores

Preliminary results from the 1982 Census of Retail Trade place total sales of women's ready-to-wear stores at $20.3 billion. About 41.2%, or $8.4 billion, was accounted for by sportswear and separates, including $873.4 million in active sportswear merchandise. In 1977, sportswear and separates represented 42.7% of women's ready-to-wear store volume.

Retail Sales of Sportswear & Separates
In Women's Ready-To-Wear Stores, 1977, 1982
(Establishments With Payroll)

	1982(p)		1977		
	Sales (Mil. $)	% of Total	Sales (Mil. $)	% of Total	% Change 1982/1977
Women's ready-to-wear stores, total	$20,310.8	100.0%	$12,343.7	100.0%	+ 64.5%
Slacks, jeans, pants & skirts	3,351.3	16.5	5,270.7	42.7	+ 58.8
Tops (shirts, blouses & sweaters)	4,143.4	20.4			
Women's active sportswear	873.4	4.3			
Number of stores with payroll	44,084	--	40,227	--	--

(p) preliminary.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade (RC82-I-16(P).

Specialty Stores

Selected Typical (Median) 1982 Merchandising & Operating Results
In Specialty Stores with Total Annual Sales over $1 Million

	All Adult Female Apparel (35)*	Women's & Misses' Sportswear (31)*	Women's & Misses' Spectator Sportswear (14)*	Women's & Misses' Active Sportswear (11)*	Juniors' Sportswear (23)*
Net sales, % change from last year	+ 2.9%	+ 1.9%	- 0.4%	+ 2.8%	+ 3.4%
Sales, % of merchandise division	100.0	46.4	33.3	3.5	19.8
Sales, % to total store sales	51.8	22.4	14.8	1.6	11.8
$ sales per sq. ft. of selling space	$150.3	$160.0	$194.3	$132.3	$167.1
Cumulative mark-on, %	51.6%	52.4%	52.1%	52.9%	52.5%
Gross margin, % of sales incl. cash discounts	43.2	42.4	41.3	45.2	43.5
Markdowns, retail, % of sales	23.8	24.8	24.5	23.8	22.3
Returns, % of sales	11.2	10.9	na	na	9.2
Sales promotions, % of sales	2.7	2.3	na	na	1.8
Salespeople's salaries, % of sales	7.2	7.1	na	na	7.3
Number of stock turns	3.6	3.8	3.8	3.4	4.2

na = not available
* Number in parentheses refers to the number of firms responding in each area.

Source: National Retail Merchants Association,
"Merchandising & Operating Results of 1982"
1983 Edition.

RETAIL SALES BY STORE TYPE

Family Clothing Stores

Sales in family clothing stores in 1982 totaled $13.5 billion, according to preliminary estimates from the census of retail trade. Of this total, 22.2% (or $2.991 billion) was accounted for by women's sportswear and separates, up from 17.7% in 1977. Women's active sportswear purchases amounted to $323.3 million in family clothing stores in 1982.

With 17,899 family clothing establishments in operation at the end of 1982, sales per store equaled approximately $752.6 thousand, 54.6% above the $486.8 thousand average generated by 16,025 establishments in 1977.

Retail Sales of Women's Sportswear & Separates
In Family Clothing Stores, 1977, 1982
(Establishments with Payroll)

	1982(p)		1977		
	Sales (Mil. $)	% of Total	Sales (Mil. $)	% of Total	% Change 1982/1977
Family clothing stores, total	$13,471.4	100.0%	$7,801.0	100.0%	+ 72.7%
Slacks, jeans, pants & skirts	1,199.0	8.9			
Tops (shirts, blouses & sweaters)	1,468.4	10.9	1,380.8	17.7	+128.5
Women's active sportswear	323.4	2.4			
Number of stores with payroll	17,899	--	16,025	--	--

(p) preliminary.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade, RC82-I-17(P).

Sporting Goods Stores

To an increasing extent in recent years sporting goods stores have added women's apparel lines to their inventories. Preliminary data for 1982 shows sales of women's and girls' wear rising to 4.8% of total sales, up from 2.9% in 1977.

Sporting Goods Stores & Bicycle Shops
(Establishments With Payrolls)

	1982(p)		1977	
	Sales (Mil. $)	% of Total	Sales (Mil. $)	% of Total
Total sales	$ 7,522.4	100.0%	$ 4,190.0	100.0%
Women's & girls' wear (except footwear)	361.1	4.8	163.4	2.9
Number of stores with payroll	20,129	--	17,235	--

(p) preliminary

Source: U.S. Bureau of the Census,
Census of Retail Trade, RD82-I-28(P).

RETAIL ADVERTISING

Percent of Year's Total Newspaper Linage Run By Retailers Each Month, 1982

	Coats & Jackets	Jeans, Pants & Shorts	Sweaters & Knit Tops	Swimsuits & Beachwear	Woven Blouses & Shirts	Juniors' Sportswear
January	7.2%	5.7%	4.5%	4.2%	5.0%	4.9%
February	6.9	8.5	5.3	4.1	8.3	7.9
March	7.4	9.6	6.0	4.0	10.0	8.9
April	6.0	10.7	7.5	6.5	9.8	7.6
May	2.6	9.9	9.1	22.5	9.0	6.9
June	2.4	7.2	5.5	28.3	4.9	3.7
July	4.0	6.8	5.6	15.1	6.1	7.2
August	9.5	10.0	9.0	2.9	8.6	14.6
September	11.2	8.8	9.6	0.4	9.4	8.0
October	17.0	7.3	10.1	0.7	8.0	8.7
November	13.5	7.7	13.2	4.5	11.1	10.8
December	12.2	7.8	14.6	6.8	9.8	10.8
Year	100.0	100.0	100.0	100.0	100.0	100.0

Source: The Advertising Checking Bureau, Inc., Neustadt Reports Division, covering all retail newspaper advertising linage in all newspapers in seven cities: Chicago, Dallas, Philadelphia, Cincinnati, Cleveland, Los Angeles and Washington. (1984 Newspaper Planbook).

CONSUMER PRICE TRENDS

Retail prices for women's apparel rose 1.7% in the twelve months ended May 1984 compared with a 4.2% increase for the overall Consumer Price Index over the same period. Prices of women's separates and sportswear declined by 5.4% during this period.

Consumer Price Indexes for Selected Women's Apparel Items
1982, 1983 & May 1983, 1984
(1967 = 100 unless other specified)

	May			Annual Average		
	1984	1983	% Change 1984/83	1983	1982	% Change 1983/1982
All items	309.7	297.1	+ 4.2%	303.5	292.4	+ 3.8%
Apparel commodities less footwear	181.5	180.2	+ 0.7	183.4	178.4	+ 2.8
Women's apparel (1977=100)	107.9	106.1	+ 1.7	109.5	105.5	+ 3.8
Coats & jackets	163.5	164.7	- 0.7	170.3	166.3	+ 2.4
Separates & sportswear (1977=100)	92.8	98.1	- 5.4	98.9	97.1	+ 1.8

Source: U.S. Department of Labor, Bureau of Labor Statistics.

CONSUMER BUYING HABITS

In a September 1983 survey undertaken by R.H. Bruskin Associates for Daily News Record (September 29, 1983), a fifth of the nationally representative sample of 500 women indicated that in the 12 months following the survey purchases of active sportswear items would increase in relation to the amount spent on activewear in the year prior to the survey. Almost a third (32.6%) of the men and women aged 18-34 years intended to raise their level of spending on active sportswear over this period.

Intention to Purchase Active Sportswear Compared With Previous 12 Months

	Intend to Purchase:						
	Much More	Somewhat More	About the Same	Somewhat Less	Much Less	None	Don't Know
Total	8.2%	13.6%	52.4%	9.1%	11.4%	4.2%	1.1%
By Sex							
Male	7.6	14.9	56.7	7.0	8.2	4.1	1.5
Female	8.8	12.3	48.5	11.1	14.2	4.3	0.8
By Age							
18-24 years	15.6	16.5	48.7	8.6	9.6	1.0	--
25-34 years	11.5	21.7	46.3	10.8	8.3	1.0	0.5
35-49 years	5.7	15.9	60.0	7.1	8.4	1.9	1.0
50-64 years	4.1	7.3	61.2	7.7	15.2	3.3	1.3
65 years & older	3.5	4.6	45.7	10.9	14.8	17.4	3.1
By Income							
Under $15,000	8.1	6.3	47.1	11.8	16.6	8.4	1.7
$15,000-19,999	9.9	10.7	50.4	10.0	12.8	6.3	--
$20,000-29,999	10.0	19.2	53.9	7.5	7.6	1.1	0.6
$30,000-39,999	6.3	14.1	61.8	7.6	9.4	0.7	--
$40,000 & over	4.9	26.0	59.2	4.1	2.6	2.5	0.8
By Region							
Northeast	8.4	15.7	46.7	8.6	13.4	6.0	1.1
North Central	4.3	13.7	55.0	11.2	10.9	4.1	0.9
South	11.0	11.9	54.4	8.6	10.7	2.2	1.2
West	8.5	13.9	52.0	7.8	10.7	5.6	1.5

The following information on purchase of women's sportswear for females aged 14 and older for the years 1983 and 1982 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. The information is based on findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

CONSUMER BUYING HABITS

Jackets

Purchases of women's jackets declined 3.9% in dollars and 1.4% in units in 1983 compared with the previous year, according to households reporting to NPD.

Purchases of Women's Jackets by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	29.1	26.1	35.1	30.7
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	22.1	24.0	16.3	17.5
Discount stores	12.5	13.4	8.9	10.2
Specialty stores	25.4	27.4	30.4	34.3
All other outlets	9.4	8.2	7.9	6.4
No answer	1.4	1.0	1.4	1.0

Purchases of Women's Jackets by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $20.00	41.0	35.9	17.7	14.9
$20.00 - $39.99	37.0	40.8	34.4	36.8
$40.00 - $69.99	15.6	17.4	25.7	28.4
$70 & over	6.4	6.0	22.2	19.9

Purchases of Women's Jackets by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	19.5	19.6	15.8	16.5
Polyester/cotton blend	20.7	19.7	18.1	18.9
Other polyester blends	10.6	10.4	11.7	10.5
100% cotton	13.8	15.5	12.1	14.8
100% wool & wool blends	10.3	8.3	19.9	15.5
100% nylon & nylon blends	11.8	12.8	7.2	8.5
All other fibers	8.5	8.1	10.9	9.4
No answer	4.9	5.4	4.3	5.9

Purchases of Women's Jackets by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	10.8%	9.3%	8.4%	7.9%	6.8%	3.8%	3.8%	7.3%	7.9%	10.1%	11.0%	12.8%	100.0%
1982	10.4	8.4	9.2	9.5	5.1	3.8	5.6	7.2	9.2	10.5	10.6	10.5	100.0
Dollars:													
1983	11.2	7.4	7.2	7.1	6.2	3.1	3.0	7.0	8.7	11.2	12.4	15.5	100.0
1982	12.0	7.4	7.7	8.2	4.2	2.5	4.2	7.2	9.6	11.8	12.5	12.6	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Skirts/Blouses

NPD panelists purchased 4.2% fewer skirts/blouses in 1983 than in 1982, resulting in a 1.3% decline in dollar expenditures for these items.

Purchases of Women's Skirts/Blouses by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0
Department stores	26.0	22.6	31.8	29.0
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	23.8	25.8	19.4	19.8
Discount stores	15.6	16.2	11.6	11.6
Specialty stores	24.0	25.0	28.1	30.2
All other outlets	9.7	9.5	8.1	8.4
No answer	0.9	0.9	1.1	1.0

Purchases of Women's Skirts/Blouses by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $8.00	31.7	35.9	14.2	14.8
$8.00 - $15.99	45.2	41.9	42.2	41.4
$16.00 - $23.99	15.2	14.7	23.3	23.9
$24.00 & over	7.9	7.4	20.3	19.9

Purchases of Women's Skirts/Blouses by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	37.7	36.8	41.6	39.7
Polyester/cotton blends	43.4	41.1	38.6	38.8
100% cotton	7.9	7.6	8.0	7.1
All other fibers	8.0	11.5	8.7	11.0
No answer	3.1	3.0	3.1	3.3

Purchases of Women's Skirts/Blouses by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	7.1%	6.1%	7.9%	8.3%	9.4%	8.3%	9.3%	8.7%	7.1%	7.5%	9.4%	10.8%	100.0%
1982	6.4	5.9	7.9	9.6	9.5	7.7	9.2	9.4	7.6	7.7	8.3	10.8	100.0
Dollars:													
1983	6.8	5.8	8.2	8.6	9.2	7.7	7.9	7.9	7.2	8.3	10.1	12.3	100.0
1982	6.2	5.6	8.2	8.9	9.0	6.8	8.4	8.3	7.0	9.0	9.4	12.1	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Jeans

Among NPD member households, denim jean purchases in 1983 were flat in both dollars and units compared with 1982. Dollar expenditures of women's corduroy jeans in 1983 dropped 18.4% from 1982 on a 21.9% reduction in unit sales. Other types of women's jeans slid 44.0% in dollars, with unit sales down 33.7%.

Purchases of Women's Jeans by Store Type, 1982, 1983

	Denim Jeans		Corduroy Jeans		Other Women's Jeans	
	1983	1982	1983	1982	1983	1982
			Percent of Units			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	18.2	18.0	20.0	19.3	17.6	27.8
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	23.6	23.0	17.2	24.6	37.0	38.4
Discount stores	21.6	18.4	19.2	14.8	13.1	8.5
Specialty stores	26.5	28.8	28.8	32.4	20.6	18.1
All other outlets	9.0	10.6	13.8	8.3	10.4	7.1
No answer	1.1	1.2	1.0	0.6	1.3	--
			Percent of Dollars			
Total	100.0	100.0	100.0	100.0	100.0	100.0
Department stores	21.0	21.5	22.8	23.7	21.8	30.8
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	20.4	18.1	15.3	22.5	29.5	33.9
Discount stores	19.9	16.5	18.8	12.6	10.3	7.1
Specialty stores	29.3	32.8	28.9	33.8	24.0	22.4
All other outlets	7.9	9.8	12.4	6.9	11.9	5.9
No answer	1.5	1.3	1.9	0.4	2.4	--

Purchases of Women's Jeans by Price Points, 1982, 1983

	Denim Jeans		Corduroy Jeans		Other Women's Jeans	
	1983	1982	1983	1982	1983	1982
			Percent of Units			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $12.00	24.9	30.6	33.7	44.2	40.0	43.2
$12.00-$17.99	35.6	29.7	38.1	30.2	22.0	28.8
$18.00-$24.99	28.3	25.2	18.7	15.8	23.3	16.0
$25.00 & over	11.3	14.5	9.5	9.8	14.7	12.0
			Percent of Dollars			
Total	100.0	100.0	100.0	100.0	100.0	100.0
Less than $12.00	12.3	15.6	16.4	24.8	19.3	24.2
$12.00-$17.99	31.9	26.6	38.9	31.8	20.2	28.9
$18.00-$24.99	35.3	31.4	25.7	23.3	29.8	22.9
$25.00 & over	20.5	26.5	18.9	20.2	30.7	23.9

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Jeans

Purchases of Women's Jeans by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
% of Units:													
Denim jeans													
1983	6.5%	6.2%	9.6%	7.9%	7.7%	6.4%	7.8%	12.5%	7.3%	8.2%	8.9%	10.9%	100.0%
1982	9.2	6.9	8.3	7.9	6.4	6.7	8.8	11.2	7.4	8.9	8.3	10.0	100.0
Corduroy jeans													
1983	5.4	7.8	5.6	6.0	7.5	4.2	4.7	10.3	6.2	13.1	13.3	15.9	100.0
1982	8.6	10.7	6.7	5.5	4.3	4.6	6.8	9.1	10.4	9.9	10.3	13.0	100.0
Other jeans													
1983	6.0	7.0	2.5	5.8	6.5	7.2	5.5	17.4	7.2	16.0	9.4	9.5	100.0
1982	3.5	12.7	9.3	18.7	4.4	4.8	6.2	6.1	8.7	7.9	6.1	11.6	100.0
% of Dollars:													
Denim jeans													
1983	6.3	6.5	9.0	8.1	7.1	6.2	7.8	13.0	7.2	8.0	9.3	11.3	100.0
1982	8.4	6.9	8.2	7.6	6.4	6.8	8.3	11.7	7.6	8.9	8.8	10.4	100.0
Corduroy													
1983	5.3	5.0	4.6	4.5	7.4	4.6	3.5	11.8	8.3	12.7	15.1	17.2	100.0
1982	8.0	11.4	6.9	5.1	3.3	3.2	5.9	9.2	10.8	11.2	10.5	14.4	100.0
Other jeans													
1983	4.4	6.4	3.0	5.6	6.7	7.4	6.9	22.7	8.4	10.1	10.7	7.5	100.0
1982	2.4	11.5	8.8	20.5	5.0	4.4	5.5	4.2	14.6	7.4	6.3	9.3	100.0

Purchases of Women's Jeans by Fibers, 1982, 1983

	Denim Jeans				Corduroy Jeans			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	16.2	16.7	16.3	14.8	46.8	52.1	50.0	51.9
100% cotton	72.7	68.8	72.0	69.0	43.0	37.5	39.5	37.5
All other fibers	5.3	8.5	5.5	9.7	6.7	5.0	7.0	5.6
No answer	5.8	5.9	6.2	6.4	3.5	5.4	3.4	5.0

	Other Women's Jeans			
	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	9.1	16.0	10.2	12.5
Polyester/cotton blend	41.4	53.0	41.9	51.6
Other polyester blends	11.0	0.9	5.2	0.6
100% cotton	25.6	20.1	25.9	25.1
Cotton blends	6.7	3.2	12.9	3.0
All other fibers	4.9	0.9	3.0	0.7
No answer	1.3	5.9	0.9	6.5

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Slacks

Purchases of women's corduroy slacks rose 8.1% in dollars and 17.2% in units between 1982 and 1983, according to NPD panel members. Non-corduroy slack purchases were up 7.9% in dollars and 7.8% in quantity during the same period.

Purchases of Women's Slacks by Store Type, 1982, 1983

	Corduroy Slacks				Non-corduroy Slacks			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	24.3	26.2	26.9	31.7	28.0	28.2	33.3	34.6
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	19.9	20.1	17.3	15.4	24.8	25.5	20.1	19.7
Discount stores	16.4	11.0	13.5	8.8	13.3	12.2	10.5	9.6
Specialty stores	30.5	33.9	33.5	35.9	24.0	23.6	28.1	27.9
All other outlets	8.2	6.8	8.0	6.4	9.1	9.6	7.4	7.3
No answer	0.8	1.9	0.8	1.9	0.7	0.9	0.6	0.8

Purchases of Women's Slacks by Price Points, 1982, 1983

	Corduroy Slacks				Non-corduroy Slacks			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $12.00	35.8	30.7	19.1	15.4	49.2	50.2	27.6	27.2
$12.00-$17.99	30.9	32.5	30.6	29.4	28.0	25.4	29.6	26.9
$18 & over	33.3	36.8	50.3	55.2	22.8	24.4	42.8	45.9

Purchases of Women's Slacks by Fibers, 1982, 1983

	Percent of Units		Percent of Dollars	
	1983	1982	1983	1982
		Corduroy Slacks		
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	52.0	48.0	54.2	49.6
100% cotton	32.5	37.2	31.8	36.0
100% polyester	5.9	8.2	4.8	6.3
All other fibers	3.4	2.5	3.7	2.2
No answer	6.1	4.1	5.5	5.9
		Non-Corduroy Slacks		
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	50.0	56.1	42.6	48.0
Polyester/cotton blend	24.3	18.6	25.1	20.2
Other polyester blends	7.8	7.9	9.1	10.1
100% cotton & cotton blends	8.7	6.4	9.7	6.9
All other fibers	5.4	7.0	9.6	10.9
No answer	3.9	3.9	3.8	4.0

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Active Sportswear - Swimwear

As reported by NPD, women's purchases in 1983 dipped 9.3% in dollars and 4.2% in the quantity purchased compared with 1982.

Purchases of Women's Swimwear by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	31.4	24.0	41.4	32.2
Mass merchandisers (Sears/Penneys/ Wards, K-mart)	25.9	28.9	20.1	22.8
Discount stores	10.8	11.3	6.9	8.1
Specialty stores	22.4	25.9	23.6	27.8
All other outlets	9.1	9.4	7.3	8.4
No answer	0.4	0.5	0.7	0.7

Purchases of Women's Swimwear by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $12.00	28.4	32.4	11.8	13.3
$12.00 - $19.99	33.4	29.6	28.1	25.4
$20.00 - $27.99	17.6	18.2	21.6	23.3
$28.00 & over	20.6	19.8	38.5	38.0

Purchases of Women's Swimwear by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	12.7	6.5	12.1	6.9
100% polyester & other polyester blends	6.3	7.1	5.7	5.7
100% nylon & nylon blends	69.9	75.7	69.7	77.2
All other fibers	4.7	3.2	4.7	2.6
No answer	6.4	7.4	7.8	7.5

Purchases of Women's Swimwear by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.6%	2.9%	6.0%	10.4%	15.6%	25.2%	22.8%	10.9%	1.9%	1.0%	0.8%	0.9%	100.0%
1982	1.5	3.8	7.2	6.8	16.9	20.7	31.0	8.0	3.0	0.8	0.2	0.1	100.0
Dollars:													
1983	1.3	3.4	6.2	10.1	16.5	26.3	22.3	10.8	1.3	0.7	0.4	0.9	100.0
1982	1.5	3.9	8.2	7.8	16.6	20.8	30.6	8.0	1.6	0.5	0.5	*	100.0

* Less than 0.1%

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Women's Shorts/Tennis Dresses

Dollar expenditures of women's shorts and tennis dresses increased 18.5% in 1983, as the quantity purchased by NPD households rose 8.7%.

Purchases of Women's Shorts/Tennis Dresses by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	21.4	19.7	27.2	27.7
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	27.9	32.5	20.6	25.5
Discount stores	18.9	17.4	14.3	13.7
Specialty stores	20.0	20.4	26.0	22.9
All other outlets	11.3	9.5	11.3	9.6
No answer	0.6	0.6	0.6	0.6

Purchases of Women's Shorts/Tennis Dresses by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $5.00	36.1	46.9	14.7	21.5
$5.00 - $10.99	45.1	36.1	45.3	39.7
$11.00 & over	18.8	17.0	40.0	38.8

Purchases of Women's Shorts/Tennis Dresses by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	16.8	23.8	10.7	15.7
Polyester/cotton blend	55.0	50.6	58.5	57.8
100% cotton	15.4	10.9	20.7	15.1
All other fibers	8.6	11.6	7.0	8.7
No answer	4.2	3.1	3.1	2.7

Purchases of Women's Shorts/Tennis Dresses by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.3%	1.9%	7.4%	12.7%	19.5%	25.6%	19.7%	6.6%	2.5%	1.7%	0.6%	0.4%	100.0%
1982	1.1	3.5	7.6	13.5	23.9	19.4	19.4	6.3	3.1	1.1	0.4	0.7	100.0
Dollars:													
1983	1.4	2.9	8.4	13.0	19.4	23.7	19.9	6.3	2.7	0.8	0.9	0.6	100.0
1982	1.2	3.2	9.3	14.0	24.9	19.9	16.8	6.4	2.1	1.1	0.4	0.7	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Women's Sweatshirts

In 1983, women's sweatshirt purchases made by NPD panel members climbed 43.8% in dollars and 40.0% in units versus a year earlier.

Purchases of Women's Sweatshirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	16.0	14.1	19.3	17.4
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	31.0	34.6	28.3	31.4
Discount stores	18.0	19.0	14.5	15.4
Specialty stores	17.6	18.1	20.4	20.0
All other outlets	16.3	13.8	16.5	15.3
No answer	1.0	0.4	1.1	0.6

Purchases of Women's Sweatshirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $8.00	45.3	47.2	26.5	27.9
$8.00 - $13.99	36.8	36.8	39.3	40.5
$14.00 & over	17.8	16.0	34.1	31.5

Purchases of Women's Sweatshirts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blends	28.3	27.4	29.4	30.1
100% acrylic	19.6	16.4	19.6	16.2
Acrylic blends	37.2	34.6	33.1	31.2
100% cotton & cotton blends (primarily cotton)	7.9	10.1	9.7	10.6
All other fibers & blends	7.0	11.4	8.2	11.9

Purchases of Women's Sweatshirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1982	6.2%	7.7%	5.9%	4.2%	4.5%	3.7%	6.1%	8.8%	7.9%	11.6%	13.8%	19.5%	100.0%
1983	6.3	6.0	8.4	4.1	3.6	3.0	6.1	9.6	10.2	13.0	13.0	16.7	100.0
Dollars:													
1982	5.7	7.6	5.6	3.9	4.1	3.6	5.0	9.8	8.0	11.1	14.9	20.5	100.0
1983	4.9	4.7	8.7	3.6	3.6	2.5	4.7	10.2	10.2	12.4	15.4	19.0	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Sweaters

Dollar expenditures of women's sweaters fell 8.8% in 1983 compared with 1982 as the number of sweaters purchased by households included in the NPD survey dropped 6.0%

Purchases of Women's Sweaters by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	27.7	26.9	31.3	30.9
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	18.8	21.4	15.4	16.7
Discount stores	17.1	15.1	12.9	10.9
Specialty stores	28.0	27.5	32.0	32.2
All other outlets	7.5	8.3	7.3	8.6
No answer	1.0	0.7	1.1	0.7

Purchases of Women's Sweaters by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $9.99	35.7	38.8	18.0	18.9
$10.00 - $19.99	45.3	44.7	44.3	44.9
$20.00 & over	19.1	16.6	37.8	36.2

Purchases of Women's Sweaters by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester & polyester blends	8.9	10.2	7.1	7.9
100% cotton & cotton blends	9.6	5.0	11.2	5.8
100% wool & wool blends	11.1	10.5	15.3	15.0
100% acrylic	49.2	51.7	41.8	45.2
Acrylic blends	11.6	14.4	12.6	15.1
All other fibers	5.7	3.9	8.3	7.0
No answer	4.0	4.1	3.7	4.0

Purchases of Women's Sweaters by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	70.1%	5.5%	3.0%	2.6%	2.1%	1.6%	3.5%	7.3%	8.6%	12.7%	18.0%	24.9%	100.0%
1982	10.8	6.9	4.5	3.0	1.8	1.7	2.6	6.3	8.4	11.9	17.4	24.8	100.0
Dollars:													
1983	9.6	4.6	2.8	2.4	2.0	1.6	3.3	7.1	8.6	12.7	18.4	26.8	100.0
1982	10.2	5.3	3.4	2.7	1.7	1.6	3.7	5.9	8.7	12.1	17.8	26.9	100.0

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

SEVENTEEN Magazine's annual Spring Apparel Buying study, conducted most recently in May 1983, detailed what teen girls spent on their 1983 wardrobe. Completed questionnaires were received by 1,027 members of SEVENTEEN's Consumer Panel, which represents a cross section of the teenage market. These results were then projected to the entire market.

Teenage Buying Trends for Sportswear & Separates

	Number Purchasing Add (000)	Number Purchased Add (000)	Number Expenditures Add (000)
Jackets			
Ski jackets	2,731	2,977	$ 136,198
Blazers	3,443	5,233	255,789
Parkas	637	643	26,517
Jackets - blouson	429	455	14,596
- bomber	247	247	7,617
Leather/suede jackets	611	611	47,689
Fur coats (real)	235	237	34,848
Pea coats	143	143	7,902
Fur jackets (fake)	78	80	3,784
Total buying jackets	5,968	10,626	534,940
Skirts			
Knee-length	5,838	13,486	365,201
Below knee-length	5,565	10,017	256,936
Above knee-length	6,475	13,144	345,819
Total buying skirts	10,571	36,647	967,956

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COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

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THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, $15.00) (July)

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The Sports/Fitness/ Leisure Markets

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THE SPORTS/FITNESS/LEISURE MARKET

Measured in terms of a constant dollar, eliminating the effects of inflation, the value of manufacturers' shipments of sporting and athletic goods, not including wheel goods, has registered a compound annual rate of growth of 1.3% in the 1972-83 period. On a current dollar basis, the value of shipments gained 7.2%.

Retail sales of all sports-fitness related products, including equipment, apparel and footwear, in 1983 were estimated at $13.6 billion, gaining 13% over 1982, and are expected to hit over $15 billion in 1984 as the economy continues to revive and employment figures improve.

The industry is composed of many segments producing a wide variety of products. Nearly all segments are prospering, but the most impressive growth is coming in the home exercise market where sales have doubled in the past two years to reach about $1 billion. Much of the gymnasium, exercise and golf equipment is purchased by higher-income consumers who have been less affected by the recent downturn in the economy, and who are able to pay more for higher quality. In addition, the more economy-minded consumer has found that it is less expensive to use exercise equipment at home than to use a health club or other facility; also more convenient.

Interest in health and fitness is expected to continue, and this is a major factor in the outlook for industry growth during the next several years as more emphasis is placed on individual self-improvement, and as the growing number of white-collar workers in the 25-44 age group seek ways to relieve stress and remain active. And this group is becoming more affluent, well able to afford quality equipment and sports apparel.

A recent Gallop Poll indicated that nearly 59% of all adults exercise daily, 12 percentage points more than in 1982 and double the 1961 figure. Some 100 million Americans engage in some form of regular exercise program and 20 million children take part in organized sports activities. The highest incidence of activity is among the 25-34 year olds, a growing age group.

Interest in apparel that has the "look" of active, sports-functional wear has generated much growth in the sportswear and footwear markets. In footwear the trend among "non-participants" is generally away from functional athletic footwear, such as running shoes, which had been popular for everyday street wear, back to sneakers or fashion footwear with a sports look.

With the outlook for the sports and fitness markets so rosy, many major firms have been moving into the industry. New entrants into the market include West Bend Company which has two makers of home exercise equipment and Campbell Soup which has purchased Triangle Manufacturing Company.

While many companies are entering the sports/fitness industry, a number already in the industry are attempting to reposition themselves with an eye toward future demographic trends. Some firms see the aging of the U.S. population as a signal that in the future, participants in sports will gravitate towards less strenuous types of activities. This has caused some companies, particularly athletic footwear companies, to expand their product mixes into apparel and other items which are usable without being used in more demanding forms of exercise.

Demand for sporting goods at the manufacturer level may suffer a decline on the institutional level due to cut-backs in government aid and declining enrollments in schools and colleges. Overall, sporting and athletic goods shipments are expected to increase at a 3.0% compound annual rate during the period ending in 1988, after adjustment for inflation, according to the Bureau of Industrial Economics.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

Preliminary data for the year 1982 has recently been issued by the U.S. Bureau of the Census for industry classifications covered in the following tables. Findings are based on a complete census of manufacturers classified in these industries, which is conducted by the Census Bureau every five years. Compared with 1977 census data, in terms of current dollars--which means they are not adjusted for changes in price levels--the value of shipments of sporting and athletic goods climbed 41%. The number of companies classified in this industry, however, registered a decline of almost 19%.

The value of shipments of the motorcycle-bicycle-parts industry in 1982 rose 20.5% compared with 1977, while the number of companies classified in the industry was down almost 24%.

It should be noted that data for 1982 are preliminary and subject to revision by the U.S. Census Bureau by early 1985. In addition, the final reports will contain detailed information by size of company, regional and state information, etc., not currently available.

Sporting & Athletic Goods, n.e.c. (SIC 3949*)

	1982(p)	1977	% Change 1982/1977
Number of companies	1,428	1,757	- 18.7%
Number of establishments, total**	1,514	1,878	- 19.4
With 20 employees or more	451	496	- 9.1
Employees, total (thous.)	47.5	57.2	- 17.0
Production workers (thous.)	35.7	46.1	- 22.6
Payroll (mil. $)	$ 676.9	$ 525.9	+ 28.7
Value added by manufacture (mil. $)#	nr	1,273.6	--
Value of industry shipments (mil. $)##	3,421.9	2,425.1	+ 41.1
Capital expenditures, new (mil. $)	76.9	62.7	+ 22.6

Motorcycles, Bicycles & Parts (SIC 3751*)

	1982(p)	1977	% Change 1982/1977
Number of companies	261	343	- 23.9%
Number of establishments, total**	266	350	- 24.0
With 20 employees or more	65	63	+ 3.2
Employees, total (thous.)	12.7	15.6	- 18.6
Production workers (thous.)	10.1	13.3	- 24.1
Payroll (mil. $)	$ 220.5	$ 168.9	+ 30.5
Value added by manufacture (mil. $)#	nr	368.9	--
Value of industry shipments (mil. $)##	1,214.6	1,007.6	+ 20.5
Capital expenditures, new (mil. $)	20.0	34.1	- 41.3

(p) preliminary
n.e.c. = not elsewhere classified
nr = not reported

(footnotes continued)

GENERAL INDUSTRY STATISTICS

* Manufacturers are classified by industry under the Standard Industrial Classification system (SIC), determined by the principal products made as shown below:

**Each business location is counted as a separate establishment.

SIC 3949 - This industry comprises establishments primarily engaged in the manufacture of sporting and athletic goods such as fishing tackle; golf and tennis goods; baseball, football, basketball and boxing equipment; billiard and pool tables; roller skates and ice skates; gymnasium and playground equipment; bowling alleys and equipment.

SIC 3751 - This industry comprises establishments primarily engaged in the manufacture of motorcycles, bicycles and similar equipment and parts. Establishments primarily engaged in the assembly of motorcycles or bicycles from purchased parts are also included in this industry.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of the same manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts on contract work and resales). The value of product shipments, including shipments by secondary producers, is covered in the Shipments section of this Fact File.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Preliminary Report Industry Series
MC 82-I-39B-4(P); MC82-I-37C-4(P)

Employment & Earnings

Current information on employment in the sporting and athletic goods industry is compiled by the U.S. Bureau of Labor Statistics. In the first four months of 1984, production worker employment averaged 8.7% above the level in the same 1983 period, reflecting the growing strength of the U.S. economy.

Average weekly earnings continued to climb, rising 4.5%, on average, over the first four months of 1984 compared with the same 1983 period.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Sporting & Athletic Goods Industry (SIC 3949)

	January - April Average			Annual Average		
	1984	1983	% Change 1984/1983	1983	1982	% Change 1983/1982
Sporting & athletic goods:						
All employees (thous.)	58.5	51.6	+ 13.4%	53.1	53.5	- 0.7%
Production workers (thous.)	42.5	39.1	+ 8.7	40.0	41.2	- 2.9
Average weekly earnings	$269.60	$258.02	+ 4.5	$264.80	$243.75	+ 8.6
Average weekly hours	41.1	39.7	+ 3.5	40.0	39.0	+ 2.6
Average overtime hours	2.9	2.0	+ 45.0	2.2	1.8	+ 22.2

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings

Employment data issued by the Bureau of Labor Statistics and by the Census Bureau are not directly comparable due to differences in methodology used by each agency in compiling data.

Industry Concentration

In the sporting and athletic goods industry, according to Census Bureau figures for the year 1981, there were 130 plants with 100 or more employees (9.3% of the 1,400 plants with paid employees). These large plants accounted for 58.4% of the industry's total workforce.

There were only 8 plants in the motorcycle/bicycle/parts industry that had 500 or more employees in 1981 (out of an industry total of 267), but these large plants had over 10,000 employees, or almost 60% of the industry total.

The Sporting & Athletic Goods Industry Employment Size, 1981

	Establishments		Employees		Annual Payroll	
	Number	%	Number (thous.)	%	Number	%
Sporting goods & athletic goods industry, total	1,400	100.0%	54.8	100.0%	$ 708.8	100.0%
By establishment size:						
Under 20 employees	899	64.2	5.9	10.8	68.4	9.6
20 to 49 employees	249	17.8	7.9	14.4	96.5	13.6
50 to 99 employees	122	8.7	9.0	16.4	100.2	14.1
100 to 249 employees	94	6.7	15.7	28.6	201.4	28.4
250 to 499 employees	28	2.0	16.3	29.8	242.3	34.3
500 or more employees	8	0.6				

(continued)

GENERAL INDUSTRY STATISTICS

Industry Concentration

The Sporting & Athletic Goods Industry Employment Size, 1981
(continued)

	Establishments		Employees		Annual Payroll	
	Number	%	Number (Thous.)	%	Mil. $	%
Motorcycles, bicycles & parts, industry total	267	100.0%	17.4	100.0%	$ 261.6	100.0%
By establishment size:						
Under 20 employees	187	70.0	1.3	7.5	16.7	6.4
20 to 49 employees	38	14.2	1.3	7.5	16.1	6.2
50 to 99 employees	16	6.0	1.2	6.9	13.1	5.0
100 to 249 employees	14	5.2	2.0	11.5	28.4	10.9
250 to 499 employees	4	1.5	1.3	7.5	16.0	6.1
500 or more employees	8	3.0	10.4	59.8	171.3	65.5

Source: U.S. Bureau of the Census,
County Business Patterns, 1981

According to estimates compiled by Sales & Marketing Management Magazine, plants in the sporting goods industry which have 100 or more employees account for over 70% of industry shipments (including all plants with 20 or more employees).

In the motorcycle/bicycle industry, plants with 100 or more employees accounted for 98% of shipments in 1983.

Employment & Share of Shipments in Large Plants, 1981 - 1983

	No. of Plants		Total	% of Shipments Accounted For By
	With 20+ Employees	With 100+ Employees	Shipments* (Mil. $)	Plants with 100+ Employees
Sporting & athletic goods industry n.e.c. (SIC 3949)				
1983	585	159	2,921.7	71
1982	553	165	3,024.7	73
1981	560	160	2,987.9	72
Motorcycles, bicycles & parts industry (SIC 3751)				
1983	70	27	1,281.7	98
1982	65	28	781.4	92
1981	67	26	1,101.0	91

* Covers plants with 20 or more employees.

Source: Sales & Marketing Management,
Survey of Industrial Buying Power, 1982, 1983, 1984
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GENERAL INDUSTRY STATISTICS

Operating Ratios

Key Business Ratios in the Sporting & Athletic Goods Industry, 1980
(Median Results)

	Sporting & Athletic Goods	Motorcycles, Bicycles & Parts
Number of manufacturers reporting	288	40
Current assets to current debt (times)	2.36	3.21
Net profits to net sales (percent)	4.59	5.39
Net profits to net worth (percent)	20.03	45.15
Net sales to net worth (times)	4.04	5.22
Net sales to net working capital (times)	4.39	5.71
Average collection period (days)	40	23
Net sales to inventory (times)	5.7	7.4

Source: Dun & Bradstreet, Inc.
Business Economics Division,
1980 Key Business Ratios,
(All Rights Reserved).

By Leading State

Preliminary information on the number of plants (establishments), employment and shipments by states for the sporting and athletic goods industry and for the motorcycle and bicycle industry has been released by the Census Bureau based on the 1982 census of manufactures.

California accounted for 15.7% of 1982 sporting goods industry shipments, followed by Illinois, with 5.1%. Illinois accounted for 10.8% of motorcycle, bicycle industry shipments.

Sporting & Athletic Goods Manufacturers By Leading States, 1982

	Establishments		Employees	Value of
	Total	With 20+ Employees	Total (Thous.)	Industry Shipments
Sporting & athletic goods (SIC 3949)				
U.S. total	1,514	451	47.5	$3,421.9
Leading states:				
California	275	82	7.2	536.7
Florida	86	25	1.9	96.8
Texas	81	20	na	(D)
Illinois	67	25	2.0	174.0
Michigan	66	20	2.1	80.4
New York	66	22	1.9	167.5
Wisconsin	66	22	1.6	108.3
Washington	65	23	1.7	118.8
Pennsylvania	55	15	1.6	145.6

(continued)

GENERAL INDUSTRY STATISTICS

By Leading State

Sporting & Athletic Goods Manufacturers
By Leading States, 1982
(continued)

	Establishments		Employees	Value of
	Total	With 20+ Employees	Total (Thous.)	Industry Shipments
Motorcycles, bicycles & parts (SIC 3751)				
U.S. total	266	65	12.7	$1,214.6
Leading states:				
California	123	27	1.7	88.1
Illinois	13	5	1.3	131.1
Ohio	9	4	na	(D)
Tennessee	9	3	na	(D)
Massachusetts	5	2	na	(D)
Pennsylvania	5	2	na	(D)
Nebraska	3	3	na	(D)
Oklahoma	2	1	na	(D)

na = not available
(D) = Withheld to avoid disclosure

Source: U.S. Department of Commerce,
1982 Census of Manufactures,
Preliminary Report, Industry Series
MC82-I-39B-4(P); MC82-I-37C-4(P)

PRODUCTION/SHIPMENTS

Leading Manufacturers

The trade publication, SportStyle, compiles an annual list of the top companies in the business (The SportStyle 50). The listing for 1983 started with a volume of $45 million, while the lowest figure in the 1981 compilation was $24 million, reflecting the great growth in sports-related businesses (including footwear, apparel, etc., as well as equipment).

PRODUCTION/SHIPMENTS

Leading Manufacturers

The Top 50 Companies Based on U.S. Sales, 1983

	Company	Mil. $
1	Nike (adjusted for calendar year)	$ 744.6
2	General Mills (Izod, Footjoy)	430.0
3	AMF (sports products and bowling)	358.0
4	Adidas	350.0
5	Tultex (Sale Knitting Co.)	288.0
6	Spalding	275.0
7	Coleman	252.5
8	Ocean Pacific	244.0
9	Wilson	233.4
10	Bassett-Walker	222.0
11	Converse	190.0
12	Fuqua Industries (sporting goods)	188.0
13	Stride-Rite Corp. (Herman's, Keds, Sperry Top-sider)	180.0
14	Puma	168.0
15	Kidde	165.0
16	Champion (includes exports & franchise royalties)	155.0
17	Jantzen	150.0
18	Colgate-Palmolive (Bike, Etonic)	123.2
19	Diversified Products (division of Liggett Group)	120.0
20	Russell Corp. (Russell Athletic)	120.0
21	Woolrich	120.0
22	Figgie International (sporting goods div.)	118.9
23	Acushnet	115.0
24	Catalina	115.0
25	Pony	114.0
26	Bata	110.0
27	Danskin (division of Esmark)	110.0
28	Munsingwear (total sales)	93.0
29	HangTen	90.0
30	Warnaco (Speedo, Spalding, White Stag)	84.0
31	New Balance	81.0
32	Merona	80.0
33	KangaRoos	76.0
34	Daiwa	75.0
35	Pannill Knits (private label)	75.0
36	Pacific Trail	69.0
37	Stone Manufacturing	65.0
38	Prince (division of Chesebrough-Ponds)	64.2
39	Robert Bruce	60.0
40	Levi Strauss & Co.	60.0
41	Timberland	60.0
42	Kayser Roth (Interwoven, Burlington)	58.0
43	Nexus (Tropix)	58.0
44	Camel	55.0
45	Wenzel	55.0
46	Ballet Makers (Capezio)	50.0
47	Dunlop	50.0
48	Kransco (includes Whammo Div.)	50.0
49	MacGregor Golf	48.0
50	Adams-Millis (includes private label)	45.0

Source: SportStyle (August 6, 1984).

PRODUCTION/SHIPMENTS

Leading Manufacturers

The top five manufacturers listed below have been taken from a more detailed list compiled by SportStyle, based on 1983 sales. Sources are market estimates or statements from corporate officers.

	1983 Sales (millions)
WATERSPORTS APPAREL	
Ocean Pacific (includes licensed sales)	$ 244
Hang Ten	90
Hobie Sportswear	35
Off Shore	30
Laguna	20
WATERSPORTS EQUIPMENT	
Kransco (includes Whamo Div.)	50
Hobie Cat/O'Brien (Coleman Div.)	40
O'Neill	20
Windsurfing International	15
Connelly	10.5
COMPETITIVE SWIMWEAR	
Speedo (All apparel divisions)	34
Arena	12.5
The Finals	6.8
Hind-Wells	3.0
Gulbenkian	1.5
COMPETITIVE RUNNINGWEAR	
Dolfin	12.5
Bill Rodgers & Co.	8.5
Sub-4	8.3
Moss Brown & Co.	7.5
Women On The Run	4.3
SKI APPAREL	
Sport Obermeyer	26
Roffe	23
CB Sport	20
Allen-A	17.5
White Stag (ski wear only)	15.5
ALPINE SKI	
Rossignol	26.0
Olin	15.0
Dynastar	14.5
K2	14.0
Atomic	10.5
GOLF EQUIPMENT	
Spalding	135
Acushnet	115
Wilson	92.6
Dunlop (includes sales of tennis products)	50.0
MacGregor	48

(continued)

PRODUCTION/SHIPMENTS

Leading Manufacturers

	1983 Sales (millions)
TENNIS RACQUETS & BALLS	
Prince (includes overseas sales)	64.2
Penn Athletic (includes sales of tennis balls only)	35
AMF/Head	20
Pro Kennex	10
Donnay	8.5
HOME EXERCISE EQUIPMENT	
Diversified Products	120
Huffy	26
AMF Whitely	20
Amerec	16.5
Vitamaster	15
OUTDOORS EQUIPMENT	
Coleman	252.5
Kellwood Corp.	60
Camel	55
Johnson Camping	25
Henderson	24
TEAM EQUIPMENT	
Rawlings	65
MacGregor	34
Hillerich & Bradsby	15.4
Riddell	14
Hutch/Reach	12
ATHLETIC FOOTWEAR	
Nike	636.6
Adidas	210
Converse	205
Puma	125
Pony	114
TEAM APPAREL	
Russell Athletic	120
Champion	105
Bike	58.2
DeLong	22.5
Medalist	21.0
BODYWEAR	
Danskin (includes general activewear)	110
Ballet Makers (Capezio) (includes footwear)	50
Flexatard	22
Carushka	12
Softouch	8.2
GENERAL ACTIVEWEAR	
Izod	360
Tultex	288
Bassett-Walker	222
Jantzen	150
Catalina	115

(continued)

PRODUCTION/SHIPMENTS

Leading Manufacturers

	1983 Sales (millions)
RUGGED OUTERWEAR	
Woolrich	$ 120
Pacific Trail	69
The North Face	32
JanSport	30
Columbia	15

Source: Selected list from SportStyle (Fairchild Publications), August 6, 1984

Sporting & Athletic Goods

Shipments of sporting goods and athletic equipment benefited from the overall economic recovery in 1983. According to the U.S. Bureau of Industrial Economics, the constant-dollar value of shipments of sporting goods and athletic equipment by all producers gained 5.3% compared with 1982. (This is a measurement of real gain, eliminating the effects of inflation). This follows a 2.1% decline in constant dollar terms in shipments in 1982 compared with 1981.

The sporting goods industry is composed of many diverse segments producing a wide variety of products. Preliminary data on the quantity and value of shipments by all U.S. producers in 1982, based on the census of manufactures, compared with 1977 (when the previous census was compiled), are covered in the following tables.

Quantity of Shipments of Selected Sporting & Athletic Goods by All Producers, 1977, 1982
(Thousands of units, unless specified)

	1982	1977	% Change 1982/1977
Fishing rods	6,919.1	8,052.0	- 14.1%
Fishing reels	3,642.6	11,055.0	- 67.1
Fishing rod & reel combinations	5,353.8	(D)	na
Golf balls (1,000 doz.)	24,062.9	16,797.0	+ 43.3
Golf clubs:			
Irons	8,043.1	10,125.0	- 20.5
Woods	3,715.0	4,032.0	- 7.9
Golf bags	1,085.0	1,432.0	- 24.2
Baseball mitts & gloves	64.5	52.0	+ 24.0
Baseball bats	378.4	553.0	- 31.6
Exercise cycles	1,316.8	na	na

(continued)

PRODUCTION/SHIPMENTS

Sporting & Athletic Goods

Quantity of Shipments of Selected Sporting & Athletic Goods by All Producers, 1977, 1982

(Thousands of units, unless specified)

	1982	1977	% Change 1982/1977
Footballs (1,000 doz.)	497.6	400.0	+ 24.4%
Soccer balls (1,000 doz.)	49.8	na	--
Bowling balls (1,000 doz.)	1,945.5	2,599.0	- 25.1
Inflatable athletic balls (other than footballs, soccerballs, etc.) (1,000 doz.)	561.4	na	--
Tennis rackets (strung & unstrung)	3,924.6	3,409.0	+ 15.1
Ice skates	457.8	1,484.0	- 69.2
Water skis	417.4	559.0	- 25.3

(D) = Withheld to avoid disclosure
na = not available

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Preliminary Report, Industry Series
MC82-I-39B-4(P)

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of Dollars)

	1982	1977	% Change 1982/1977	% of Total 1982
Sporting & Athletic Goods, total	$3,166.5	$2,216.9	+ 42.8%	100.0%
Fishing tackle & equipment	313.8	270.1	+ 16.2	9.9
Glass fishing rods	33.2	48.2	- 12.7	1.0
Graphite metal fishing rods	8.9			
Other fishing rods	2.2	3.8	- 42.1	0.1
Fishing reels	49.8	63.4	- 21.5	1.6
Fish hooks, including snelled	24.4	15.3	+ 59.4	0.8
Casting plugs, spinners & spoons, flies, lures & similar artificial baits	64.4	49.2	+ 30.9	2.0
Tackle boxes	12.9	25.3	- 49.0	0.4
Fishing rod & reel combinations	59.6	64.6	+ 89.6	2.0
All other fishing equipment	62.9			

(continued)

PRODUCTION/SHIPMENTS

Sporting & Athletic Goods

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982
(Millions of Dollars)
(continued)

	1982	1977	% Change 1982/1977	% of Total 1982
Playground, gymnasium & gymnastic equipment	$ 523.8	$ 257.8	+103.1%	16.5%
Home playground equipment, incl. swing sets, slides, seesaws, sandboxes, etc.	78.1	57.2	+ 36.2	2.5
Institutional playground equip., incl. swing sets, slides, seesaws, etc.	57.8	35.3	+ 63.7	1.8
Gymnasium & gymnastic apparatus & equip.	53.3	56.7	- 6.0	1.7
Health, physical fitness & exercise equip.	130.5	98.6	+237.9	4.1
Weight lifting equipment	121.5			3.8
Exercise cycles	81.2			2.6
Playground, gymnasium & gymnastic equip. n.s.k.	1.4	9.9	- 85.9	0.1
Other Sporting & Athletic Goods	1,359.8	1,060.8	+ 28.2	42.9
Billiard & pool tables	55.6	52.9	+ 5.1	1.8
Billiard & pool supplies	9.8	6.8	+ 44.1	0.3
Bowling alleys & bowling pin setters	16.3	1.5*	(X)	0.5
Bowling alley playing supplies:				
Bowling balls	36.7	34.6	+ 6.1	1.2
Other bowling allev supplies	80.9	66.1	+ 22.4	2.6
Baseballs	21.1	11.7	- 12.1	0.7
Softballs		12.3		
Baseball mitts & gloves	25.3	12.2	+107.3	0.8
Baseball bats, incl. softball:				
Wood	30.3	10.5	+ 28.9	1.0
Metal		13.0		
Soccer balls	2.5	**	na	0.1
Footballs	28.6	21.7	+ 31.8	0.9
Basketballs	16.2	30.7	- 47.2	0.5
Inflatable athletic balls other than basketballs & footballs	7.8	19.0	- 58.9	2.5
Shoe & rink roller skates	57.0	40.2	+ 41.8	1.8
Wooden & plastic skateboards, incl. complete sets	3.7	49.5	- 92.5	0.1
Ice skates	13.6	21.4	- 36.4	0.4
Snow skis	37.5	42.5	- 11.8	1.2
All other winter sports equipment	23.1	35.8	- 35.5	0.7
Surfboards	2.1	20.2	+ 65.3	0.1
Water skis	32.3			1.0

(continued)

Sporting & Athletic Goods

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982
(Millions of Dollars)
(continued)

	1982	1977	% Change 1982/1977	% of Total 1982
Underwater sports equipment & sail boards	$ 78.6	$ 36.8	+113.6%	2.5
Lawn tennis equipment:				
Rackets, all types	163.5	52.6	+210.8	5.2
Tennis balls	97.4	63.1	+ 18.1	3.1
All other tennis equip. & accessories		19.4		
Racquetball rackets	30.9	***	na	1.0
Archery equipment	69.8	63.7	+ 9.6	2.2
Football protective equipment	20.7	29.8	- 30.5	0.7
Body protective equipment, of all types	41.1	15.8	+160.1	1.3
Football, baseball & soccer equip., n.e.c.	31.2	26.0	+ 20.0	1.0
Wading & above ground pools, under 15 ft. in diameter, not filtered, including plastics & metal	71.7	13.4	+435.1	2.3
Above ground swimming pools, 15 ft. in diameter & over, filtered (completely manufactured)	37.2	46.3	- 19.7	1.2
Other sporting & athletic equipment	217.3	191.3	+ 13.6	6.7

n.s.k. = not specified by kind
n.e.c. = not elsewhere classified
na = not available
* = did not include pin setters in 1977
** = included in inflatable athletic balls in 1977
*** = included in other sporting & athletic equipment in 1977.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Preliminary Report, Industry Series
MC82-I-39B-4(P)

Bicycles, Motorcycles, Mopeds

The constant-dollar value of total shipments of motorcycles, bicycles and parts by all U.S. producers was up an estimated 12.6% over 1982, according to the U.S. Bureau of Industrial Economics, following a decline of more than 13% in the previous year. Following the worst year since 1969--1982--product shipments of bicycles and parts rebounded 16% in current dollars to an estimated $723 million.

Manufacturers have pared down inventories of bicycles and the largest manufacturer closed plants, concentrating production in one plant in Ohio. Lightweight 10-speed bicycles have become increasingly important, but BMX types have also increased in demand in recent years, and made up 37% of the market in 1982 vs. 53% in domestically produced lightweights. A new entrant in the market, the "mountain bike" is also gaining in popularity.

PRODUCTION/SHIPMENTS

Bicycles, Motorcycles, Mopeds

Quantity & Value of Shipments of Motorcycles, Bicycles & Parts, 1977, 1982
(Quantity in thousands; Value in millions of dollars)

	Quantity		Value	
	1982	1977	1982	1977(r)
Motorcycles, bicycles, parts, total	--	--	$ 992.8	$ 847.3
Bicycles, adult tricycles, unicycles; children's 2-wheel sidewalk cycles	--	--	565.1	490.4
Bicycles, complete, with 1 or both wheels 25 inches or more				
Single speed	243.1	834.1	15.9	38.3
Three speed	573.2	744.7	35.6	40.9
Five speed	*	105.7	*	8.7
Ten speed	2,182.5	2,102.8	153.1	153.2
Over ten speed	353.0		34.1	
Bicycles, complete, with both wheels less than 25 inches	3,244.5	3,411.4	206.1	152.7
Other, incl. unicycles & adult tricycles	74.1	150.9	21.1	12.0
Bike parts & type not specified	--	--	99.2	84.5
Motorcycles, motorbikes, mopeds, scooters, trail vehicles & parts	--	--	373.0	286.1
Type not specified		--	54.7	70.7

* Combined with data on over 10 speed

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Preliminary Report, Industry Series MC82-1-37C-4(P)

Activewear

Current information on U.S. production and value of shipments of major types of active sportswear for men and women is published by the U.S. Bureau of the Census in the Current Industrial Reports series.

PRODUCTION/SHIPMENTS

Activewear

Production & Value of Shipments of Active Sportswear, 1982, 1981
(Quantity in 1,000 dozens; Value in millions of dollars)

	Quantity			Value		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Men's & boys':						
Athletic shorts, incl. jogging shorts & tennis shorts	4,631	4,625	+ 0.1%	157.6	156.7	+ 0.6%
Sweatshirts	6,935	4,818	+ 43.9	345.9	269.8	+ 28.2
Sweat pants	2,206	1,888	+ 16.8	127.4	100.0	+ 27.4
Warm-up or jogging suits	1,323	1,316	+ 0.5	118.3	105.5	+ 12.1
Swimwear, total	1,573	1,920	- 18.1	97.3	117.8	- 17.4
Woven	1,094	1,373	- 20.3	na	na	--
Knit	216	228	- 5.3	na	na	--
Not specified	263	319	- 17.6	na	na	--
Team sports uniforms, total	1,195	1,193	+ 0.2	81.1	79.6	+ 1.9
Softball & baseball	476	453	+ 5.1	36.4	36.3	+ 2.8
Football	346	379	- 8.7	22.5	22.4	+ 0.4
Basketball	315	330	- 4.5	18.8	19.0	- 1.1
Other	58	31	+ 87.1	3.4	1.9	+ 78.9
Ski jackets, incl. vests	108	112	- 3.6	50.5	52.9	- 4.5
Ski pants	16	19	- 15.8	8.9	10.3	- 13.6
Women's, misses' & juniors':						
Athletic shorts, incl. jogging shorts, tennis skirts, etc.	929	822	+ 13.0	52.9	49.8	+ 6.2
Sweatpants	79	na	--	5.4	na	--
Warm-up or jogging suits	1,909	1,399	+ 36.5	143.6	110.0	+ 30.5
Swimsuits, total	3,052	3,191	- 4.4	409.8	406.7	+ 0.8
Woven	589	466	+ 26.4	na	na	--
Knit	1,913	2,168	- 11.8	na	na	--
Not specified	550	557	- 1.3	na	na	--
Ski jackets, incl. vests	50	66	- 24.2	29.6	33.6	- 11.9
Ski pants	14	18	- 22.2	7.9	6.9	+ 14.5
Team sports uniforms	574	384	+ 49.5	35.9	23.4	+ 53.4

na = not available
(D) = withheld to avoid disclosure

Source: U.S. Bureau of the Census,
Current Industrial Reports (MA-23E & F(83)-1).

PRODUCTION/SHIPMENTS

Athletic Footwear

After a steep 6.6% decline in athletic footwear production between 1981 and 1982, preliminary data for 1983 indicates that although the decline continued, it has slowed somewhat. The U.S. Department of Commerce reported that 16.4 million pairs of athletic footwear were produced in 1983 compared with 16.6 million in 1982 and 17.8 million in 1981.

Production of Athletic Shoes for Men, Women & Children, 1980-1982
(Quantity in thousands of pairs)

	1982	1981	1980	% Change 1982/1981
Athletic shoes, total	16,648	17,831	15,038	- 6.6%
By type:				
Designed for sport	6,474	7,674	4,451	- 15.6
All others (joggers, etc.)	10,174	10,157	10,587	+ 0.2
Up to size 3	1,191	1,543	1,902	- 22.8
Size 3 & over	8,983	8,614	8,685	+ 4.3
By construction:				
Cemented, incl. sliplasted	7,082	7,774	10,101	- 8.9
Welt, incl. silhouwelt	(D)	(D)	(D)	na
Injection molded	8,897	8,935	4,112	- 0.4
All other construction	(D)	(D)	(D)	na

D = Withheld to avoid disclosure
na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Footwear, MA-31A(82)-1, MA31A(81)-1

While production of athletic footwear registered a decline of 6.6% in 1982, the quantity of shipments registered a decline of only 0.2%. However the value of shipments showed a gain during this period, climbing to a total of $226.1 million in 1982, 5.5% better than the total registered in the previous year.

Quantity & Value of Shipments of Athletic Footwear, 1981, 1982
(Quantity in 1,000 pairs; Value in millions of dollars)

	Quantity		% Change	Value		% Change
	1982	1981	1982/1981	1982	1981	1982/1981
Athletic footwear (men's, women's & children's)	17,188	17,221	- 0.2%	$226.1	$214.4	+ 5.5%

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Footwear MA31A(82)-1

PRODUCTION/SHIPMENTS

Athletic Footwear

Distribution of Production of Athletic Footwear by Months, 1981-1983

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1983(p)	100.0%	9.5%	12.3%	11.7%	10.4%	10.3%	8.1%	4.5%	6.8%	5.4%	6.7%	6.8%	7.5%
1982	100.0	8.8	9.0	9.7	8.5	8.2	7.8	4.7	9.0	8.4	9.5	8.0	8.4
1981	100.0	9.1	8.6	9.3	9.9	8.8	9.0	6.6	8.4	7.7	8.6	6.8	7.2

(p) = preliminary

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Footwear, MA31A(82)-1.

PRODUCER PRICE TRENDS

Sporting goods and athletic goods priced at the factory level have been edging down in recent months. As of May 1984, the index registered 0.2% below the index in May 1983. For the year 1982 compared with 1981, producer prices for sporting goods were up 4.4%.

Factory prices on all athletic footwear in May 1984 compared with a year earlier were up 2.6%; types designed for sports were up 4.2% in price compared with May 1983.

Producer Price Indexes for Specified Types of Sporting Goods & Activewear, 1981-1984
(1967 = 100, unless otherwise noted)

	May		Annual Average		% Change	
	1984	1983	1982	1981	May 1984/1983	Year 1982/1981
Athletic footwear (June 1980=100)	104.1	101.5	102.5	98.6	+ 2.6%	+ 4.0%
Designed for sports	115.2	110.6	--	105.7	+ 4.2	--
Sporting goods & athletic goods	206.1	206.5	204.9	196.2	- 0.2	+ 4.4
Golf balls	na	na	91.0	88.6	--	+ 2.7
Golf clubs, iron	na	na	123.6	122.8	--	+ 0.7
Golf clubs, wood	na	na	127.5	125.2	--	+ 1.8
Baseball gloves	164.6	192.8	190.6	191.9	- 1.5	- 0.7
Footballs	na	na	208.7	193.2	--	+ 8.0
Bowling balls	182.8	177.2	172.3	160.7	+ 3.2	+ 7.2
Bicycles	270.7	271.1	269.2	248.8	- 0.1	+ 8.2

na = not available

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Foreign Trade is one of the areas of the sports/fitness market which is of major concern to the industry. The U.S. Bureau of Economic Analysis reports in the 1984 Industrial Outlook that imports of sporting and athletic goods reached a total of $770 million in 1983 and a rise to $866.3 million is estimated for 1984. This would mark an increase of 12.5% for imports, while exports are only expected to rise 7.0%, to $396.6 million.

The trend is not expected to hold over into the motorcycle, bicycle and parts segment, however. The Bureau of Economic Analysis estimates that in 1984 imports in this segment will rise only 2.5% to $1,025.0 million while an increase of 10.0%, to $118.7 million is expected in exports. It must be noted, however, that imports share of the market is much higher in this segment of the industry than in the sporting goods segment (49.4% vs. 20.8%).

Summary of Foreign Trade in 1983 & Impact on Industry

	Sporting & Athletic Goods	Motorcycles, Bicycles, Parts, etc.
Value of product shipments (mil. $)	$3,311.0	$1,132.0
Value of exports (mil. $)	385.0	107.0
Value of imports (mil. $)	770.0	1,000.0
Exports as a % of shipments	11.6	9.5
Imports as a % of new supply*	18.9	46.9
Imports as a % of apparent consumption**	20.8	49.4

* new supply is the sum of product shipments plus imports
**Apparent consumption is the sum of product shipments plus imports less exports

Source: U.S. Bureau of Industrial Economics
1984 Industrial Outlook

Imports

Imports are a growing concern in the sporting goods industry. According to the U.S. Department of Commerce (1984 Industrial Outlook), imports of sporting goods overall increased a total of 11% in 1983 and accounted for nearly 21% of apparent U.S. consumption. This compares with an estimated 20% of apparent consumption which imports captured in 1982.

Government sources report that three Asian countries (Taiwan, Korea and Japan) represent 61% of sporting goods imports. While Taiwan and Korea tend toward low-end, labor-intensive goods, the Japanese are producing higher-quality, higher-priced goods.

Individual categories which showed large gains in import penetration in 1983 include golf equipment, tennis rackets, squash rackets, snow skis and equipment, basketballs and exercise equipment.

In the bicycle segment of the industry, which is generally assumed to be import sensitive, domestic manufacturers fared rather well. Imports as a percent of apparent consumption rose from 26% in 1982 to 28% in 1983. In the bicycle parts area however, import penetration rose to nearly 50% in 1983.

FOREIGN TRADE

Imports

Imports of Specified Types of Sporting & Athletic Goods, 1982, 1983

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Bagatelle, billiard & pool equip. (exc. tables) & parts	$ 6.7	$ 8.0	- 16.3%	--	--	--
Table tennis equip. (exc. tables) & parts	3.2	3.4	- 5.9	--	--	--
Tables designed for games	1.6	0.9	+ 77.8	--	--	--
Fishing equipment, total	160.5	162.7	- 1.3	--	--	--
Snelled fish hoods	1.6	2.4	- 33.3	--	--	--
Fish hooks other than snelled	8.0	8.0	--	--	--	--
Artificial baits & flies	12.4	11.9	+ 4.2	80,954.1	114,523.9	- 29.3%
Fishing rods	43.4	43.7	- 0.7	10,889.6	10,975.9	- 0.8
Parts for fishing rods	4.3	4.8	- 10.4	--	--	--
Fishing reels	70.9	72.0	- 1.5	9,824.8	10,286.0	- 4.3
Parts of fishing reels	1.6	1.2	+ 33.3	--	--	--
Sport fishing tackle & equipment & parts, n.e.c.	18.3	18.7	- 2.1	--	--	--
Golf equip., total	73.5	64.0	+ 14.8	--	--	--
Golf balls	1.8	1.2	+ 50.0	3,565.5	4,779.7	- 25.4
Golf clubs	7.3	3.9	+ 87.1	454.7	237.5	+ 91.4
Parts for golf clubs	30.1	19.3	+ 56.0	--	--	--
Golf gloves	26.0	34.5	- 24.6	9,712.3	12,046.7	- 19.4
Golf equip. & parts, n.e.c.	8.3	5.1	+ 62.7	--	--	--
Bicycles, having both wheels over 25 inches	149.0	98.0	+ 52.0	1,739.1	1,034.8	+ 68.1
Parts for bicycles, n.e.c.	137.9	89.3	+ 54.4	--	--	--
Lawn tennis equip., total	66.6	50.5	+ 31.9	--	--	--
Lawn tennis balls	0.7	1.3	- 46.2	1,533.6	2,287.4	- 33.0
Lawn tennis racquets, strung or not strung	54.0	40.2	+ 34.3	3,743.3	3,656.8	+ 2.4
Lawn tennis equip. & parts, n.e.c.	11.9	9.0	+ 32.2	--	--	--
Baseball equip., total	94.0	103.3	- 9.0	--	--	--
Baseballs & softballs	45.8	46.9	- 2.3	31,652.4	31,546.3	+ 0.3
Gloves & mitts for baseball & softball	38.2	45.7	- 16.4	4,794.0	5,693.6	- 5.8
Baseball equip. (exc. balls & gloves) & parts, n.e.c.	10.0	10.7	- 6.5	--	--	--
All other balls, total	51.5	42.8	+ 20.3	--	--	--
Basketballs	15.4	10.7	+ 43.9	4,094.6	2,568.2	+ 59.4
Footballs	3.6	4.2	- 14.3	1,500.0	1,339.5	+ 12.0
Soccer & polo balls	16.1	12.8	+ 25.8	3,911.4	2,908.2	+ 34.4
Bowling balls	0.3	0.8	+ 62.5	1.6	28.4	- 94.4
Balls for games & sports, n.e.c.	16.1	14.3	+ 12.6	--	--	--

(continued)

FOREIGN TRADE

Imports

Imports of Specified Types of Sporting & Athletic Goods, 1982, 1983

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Dollars)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Skates (roller & ice), total	$ 21.9	$ 21.6	+ 1.4%	--	--	--
Roller skates (incl. footwear with skates permanently attached) & parts	9.6	7.7	+ 24.7	--	--	--
Ice skates permanently attached to footwear	10.4	11.0	- 5.5	446.0	391.1	+ 14.0%
Ice skates not permanently attached to footwear	0.8	0.3	+166.7	8.8	3.3	+166.7
Ice skate blades & other parts	1.1	2.6	- 57.7	--	--	--
Ski & allied equip., total	92.1	74.1	+ 24.2	--	--	--
Snow skis	42.4	30.2	+ 40.4	833.2	573.4	+ 45.3
Tobbogans	1.2	2.0	- 40.0	144.8	127.3	+ 13.7
Ski equip. (water ski, bindings, poles, etc.) n.e.c.	48.5	41.9	+ 15.8	--	--	--
Hockey equip. (exc. skates) & parts	18.0	17.2	+ 4.7	--	--	--
Archery equip. & parts	2.2	1.7	+ 29.4	--	--	--
Playground, gymnasium, gymnastic & exercise equip., n.e.c.	85.7	46.3	+ 85.1	--	--	--
Game, sport, or athletic equip., n.e.c.	133.1	80.7	+ 64.9	--	--	--

n.e.c. = not elsewhere classified

*The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price, including all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Note: Data on imports of activewear is not available separately from general-use apparel for the most part, and therefore not included in the above table. For athletic footwear, see the FOOTWEAR FACT FILE.

Source: U.S. Bureau of the Census,
U.S. General Imports,
(FT 135, December 1982, 1983).

FOREIGN TRADE

Exports

Exports are seen as one of the biggest growth areas for the sporting goods industry in the future. One of the major reasons for this optimism is the recent agreement with Japan lifting many of the barriers to exports to that country. In 1982, Japan alone accounted for almost one-third of U.S. exports.

Exports accounted for approximately 12% of domestic shipments in 1983, according to the 1984 U.S. Industrial Outlook, relatively even with the total of the year before. This bodes well for U.S. manufacturers as 1983 was a difficult year for exports due to an unusually strong U.S. dollar vs. other foreign currencies, making U.S.-made products relatively more expensive.

Exports by individual product were a mixed bag in 1983, with some showing large increases while others registered declines. Major increases in 1983 were recorded by golf equipment and exercise equipment both up by better than 10%. Offsetting these gains were the declines recorded by fishing equipment, roller skates and baseballs.

In the bicycle segment of the industry, exports represented 9.5% of domestic shipments in 1983, down from the 9.8% registered in 1982.

Summary of U.S. Exports of Sporting & Athletic Goods, 1982, 1983

	Value (F.A.S.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Bagatelle, billiard & pool equip. (exc. tables) & parts	$ 0.9	$ 1.2	- 25.0%	--	--	--
Billiard & pool tables	2.3	3.4	- 32.4	4.9	7.0	- 30.0%
Tables designed for games other than billiards & pool	0.6	1.0	- 40.0	--	--	--
Fish hooks, incl. snelled & artificial baits & flies	4.5	3.9	+ 15.4	--	--	--
Fishing rods	1.9	1.6	+ 18.8	126.6	85.4	+ 48.2
Fishing reels	2.5	2.7	- 7.4	116.1	128.2	- 9.4
Sport fishing equip. (incl. baskets & creels) n.e.c.	13.1	14.8	- 11.5	--	--	--
Archery equip. & parts	5.2	5.8	- 10.3	--	--	--
Baseball & softball equip. (incl. balls, bats, gloves, mitts, etc.)	23.5	25.2	- 6.7	--	--	--
Golf balls	25.8	28.5	- 9.5	46,065.1	45,227.6	+ 1.9
Golf clubs	59.2	64.5	- 9.8	2,073.7	2,432.7	- 14.8
Parts of golf clubs	30.2	24.4	+ 23.8	--	--	--
Golf equip. (incl. gloves, tees, golfball parts, etc.) n.e.c.	11.9	11.0	+ 8.2	--	--	--

(continued)

FOREIGN TRADE

Exports

Summary of U.S. Exports of Sporting & Athletic Goods, 1982, 1983
(continued)

	Value (F.A.S.*) (Millions of Dollars)			Quantity (Thousands of Dollars)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Hockey equip. (exc. skates) & parts	$ 1.1	$ 1.4	- 21.4%	--	--	--
Lawn tennis balls	12.3	7.5	+ 64.0	10,622.5	5,465.4	+ 94.4%
Lawn tennis racquets, strung or not strung	20.7	26.7	- 22.5	699.7	911.9	+ 23.3
Lawn tennis equip., n.e.c.	9.0	9.3	- 3.2	--	--	--
Roller skates (incl. footwear with skates permanently attached) & parts	2.0	3.3	- 39.4	--	--	--
Snow skis	14.2	15.7	- 9.6	207.9	174.9	+ 18.9
Water skis	2.4	3.5	- 31.4	27.3	37.6	- 27.4
Snow equip. (incl. snow shoes, sleds, tobbogans, etc.) & parts, n.e.c.	2.5	4.0	- 37.5	--	--	--
Basketballs	1.4	2.1	- 33.3	177.2	271.2	- 34.7
Inflatable balls (incl. footballs, soccer, volley, etc.) n.e.c.	1.3	1.8	- 27.7	262.5	432.9	- 39.4
Non-inflatable balls for games & sports, n.e.c.	2.6	3.2	- 18.8	--	--	--
Bowling balls	3.3	2.6	+ 26.9	120.8	108.4	+ 11.4
Bowling equip. (exc. balls & alleys) & parts, n.e.c.	24.1	22.3	+ 8.1	--	--	--
Playground, gymnastic, gymnasium & exercise equipment	34.2	31.5	+ 8.6	--	--	--
Skateboards	0.1	0.1	--	5.8	6.0	- 3.3
Skateboard decks	#	#	--	0.1	0.1	--
Skateboard parts (exc. decks), n.e.c.	2.9	4.6	- 37.0	--	--	--

(continued)

FOREIGN TRADE

Exports

Summary of U.S. Exports of Sporting & Athletic Goods, 1982, 1983
(continued)

	Value (F.A.S.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Bicycles with at least one wheel over 25 inches	$ 0.5	$ 0.8	- 37.5%	5.7	11.4	- 50.0%
Parts for bicycles	10.4	7.9	+ 31.6	--	--	--
Game, sport, or athletic equip., n.e.c. (incl. ice skates, boxing gloves, etc.)	27.5	34.0	- 19.1	--	--	--

# = Less than $500,000
n.e.c. = not elsewhere classified
na = not available
* The export value is generally equivalent to the f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Note: Data on exports of activewear is not available separately from general-use apparel for the most part, and therefore not included in the above table.

Source: U.S. Bureau of the Census,
U.S. Exports, (FT 410), December 1982
U.S. Exports, (FT 446), December 1983

AT THE RETAIL LEVEL

CONSUMER MARKETS

Several factors are expected to aid in the continuation of the climb in sales of sporting and fitness equipment. The most important of these factors is the rise in real personal disposable income. This rise has continued well into 1984 and is expected to continue. Some economists estimate that the rise could be as much as 20% by 1986. With the sports/fitness/leisure markets extremely income sensitive, this rise bodes well for the industry.

Another important factor in the growth of the sports/fitness industry is the increased interest in fitness by women and older people. As the number of people with interest in active sports grows, so shipments of sports equipment and apparel are also expected to grow.

CONSUMER MARKETS

Market prospects are also enhanced by current demographic trends. The fastest growing segment of the population between 1984 and 2005 is expected to be the 35 - 54 year old bracket. These people are generally the group most interested in sports participation, fitness, and fashionable sportswear. As this group, which is in its prime earning years, grows so are sales of sporting goods expected to grow.

Currently, the 35 - 54 year bracket represents 22.4% of the U.S. population. By 2005, this group is expected to grow to 29.9% of the total.

With the generally accepted income-sensitivity of the sporting goods market, the influx of women into the work force is also aiding the boost in sales. As more and more women either join or return to the labor force, the median household income has risen dramatically. With less free time, these women are buying more fitness equipment for their homes so as to more easily stay in condition.

The Size of the Potential Market

Population Projections - 1984, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Male							
Total, all ages	115,073	125,464	134,297	+ 16.7%	100.0%	100.0%	100.0%
Under 5 years	9,329	9,635	8,931	- 4.3	8.1	7.7	6.6
5 to 9 years	8,296	9,866	9,094	+ 9.6	7.2	7.9	6.8
10 to 15 years	10,708	11,245	11,698	+ 9.2	9.3	9.0	8.7
16 years & over	86,742	94,718	104,574	+ 20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	- 13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+ 56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+ 35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+ 27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+ 20.4	--	--	--
Female							
Total, all ages	121,343	132,251	141,381	+ 16.5	100.0	100.0	100.0
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.9
16 years & over	94,279	102,903	113,018	+ 19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	- 14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+ 52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+ 30.1	9.8	8.3	10.9
65 & over	16,768	20,205	21,957	+ 30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+ 21.0	--	--	--

(continued)

The Size of the Potential Market

Population Projections - 1984, 1994, 2005
(Middle Series*)
(continued)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Total, male & female							
Total, all ages	236,416	257,714	275,677	+ 16.6	100.0%	100.0%	100.0%
Under 5 years	18,232	18,823	17,449	- 4.3	7.7	7.3	6.3
5 to 9 years	16,219	19,281	17,772	+ 9.6	6.9	7.5	6.5
10 to 15 years	20,944	21,991	22,865	+ 9.2	8.9	8.5	8.3
16 years & over	181,021	197,619	217,591	+ 20.2	76.5	76.7	78.9
16 - 19	15,009	13,138	15,765	+ 5.0	6.3	5.1	5.7
20 - 34	62,726	58,792	54,122	- 13.7	26.5	22.8	19.6
35 - 54	53,090	71,389	82,018	+ 54.5	22.4	27.7	29.7
55 - 64	22,210	20,793	29,459	+ 32.6	9.4	8.1	10.7
65 & over	27,986	33,507	36,227	+ 29.4	11.8	13.0	13.1
Median age (years)	31.1	34.3	37.6	+ 20.9	--	--	--

*Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports
Series P-25, No. 952 (May 1984)

During the 1970's the nation's household population grew at a rate of less than 1% a year, but real disposable income grew by better than 3%. The number of households with annual earnings of $35,000 or more (measured in constant 1982 dollars) rose some two and a half times faster than the nation's total household count.

During the 1980's the number of households in the upper brackets will grow even faster, as the baby boom generation reaches the age of peak earning power. By contrast, in the preceding 10 years the young adult population just entering the labor force and relatively low incomes was growing the fastest.

The Consumer Research Center of The Conference Board and the U.S. Bureau of the Census have issued a report on a joint study of the discretionary income market--households where spendable income exceeded the average spendable income of "similar" households by 30% or more. The amount by which it exceeded that level was defined as discretionary income. "Similar" households were considered to be units of identical size, of about the same age, and located in the same type of communities. According to this definition, slightly over 25 million households (21% of the total) had some discretionary income in 1980. Total discretionary income was $193 billion--representing about 14% of the total after-tax income of the nation's households and 28% of the total for households with at least some discretionary income.

Total Households & Households With Discretionary Income, 1980
By Age of Head

				Households With Discretionary Income			
	Total Hhlds. (thous.)	After Tax Income Aggregate (billions)	Average	Total No. (thous.)	% of All Hhlds.	Spendable Discret. Income Aggregate (billions)	Average
Total	82,368	$1,340.4	$16,272	25,292	30.7%	$193.3	$7,644
Age of Householder							
Under 25 years	6,443	74.6	11,584	1,170	18.2	5.4	4,612
25 to 29 years	9,514	142.7	15,002	2,633	27.7	14.2	5,383
30 to 34 years	9,639	163.5	16,959	3,017	31.3	19.4	6,433
35 to 39 years	7,969	150.5	18,884	2,466	30.9	18.9	7,646
40 to 44 years	6,494	132.0	20,334	2,175	33.5	18.3	8,429
45 to 49 years	6,209	133.9	21,566	2,216	35.7	20.3	9,177
50 to 54 years	6,486	132.5	20,423	2,455	37.8	21.6	8,810
55 to 59 years	6,742	128.9	19,123	2,662	39.5	23.9	8,963
60 to 64 years	5,962	96.0	16,098	2,111	35.4	17.8	8,428
65 years & over	16,912	185.7	10,981	4,388	25.9	33.6	7,646

Source: The Conference Board & the U.S. Bureau of the Census.
A Marketer's Guide to Discretionary Income (Nov. 1983)

Sports Participation & Attendance

The most comprehensive study on sports participation in the United States is the A.C. Neilson study covering the year 1982. This study--one of a series conducted every three years--found that between 1979 and 1982, snow skiing was the fastest growing sport, as far as participation, with an increase of 26.6%. Soccer was found to have the second highest percentage increase in participation with an increase of 23.0%.

Swimming remained the most popular sport participated in in 1982 with bicycling rating a distant second.

CONSUMER MARKETS

Sports Participation & Attendance

Participation in Selected Sports, 1976, 1979, 1982
(Thousands of Participants)

	1982	1979	1976	Percent Change 1982/1979	Percent Change 1982/1976
Swimming	102,286	105,441	103,503	- 3.0%	- 1.2%
Bicycling	72,155	69,810	75,015	+ 3.3	- 3.8
Fishing	63,689	59,275	63,901	+ 7.4	- 0.3
Camping	61,592	60,300	58,102	+ 2.1	+ 6.0
Boating	41,973	37,920	35,230	+ 10.6	+ 19.1
Bowling	40,260	43,330	44,434	- 7.0	- 9.4
Physical conditioning*	34,914	na	na	na	na
Jogging/running	34,274	35,727	na	- 4.1	na
Roller skating	30,156	25,359	na	+ 18.9	na
Pool/billiards	29,926	31,937	35,085	- 6.3	- 14.7
Softball	28,033	28,458	27,268	- 1.5	+ 2.8
Tennis	25,450	32,271	29,201	- 21.1	- 12.8
Basketball	25,322	24,048	25,818	+ 5.3	- 1.9
Snow skiing**	19,490	15,397	10,999	+ 26.6	+ 77.2
Table tennis	19,337	26,908	32,215	- 28.1	- 40.0
Hunting	18,646	19,711	20,480	- 5.4	- 9.0
Volleyball	18,365	na	na	na	na
Ice skating	18,032	18,924	25,772	- 4.7	- 30.0
Water skiing	18,032	16,922	14,681	+ 6.6	+ 22.8
Golf	17,367	15,897	16,568	+ 9.2	+ 4.8
Football	14,042	14,300	14,911	- 1.8	- 5.8
Baseball	13,556	15,039	15,670	- 9.9	- 13.5
Racquetball	12,098	10,654	2,784	+ 13.6	+334.6
Motorbiking/motorcycling	12,073	10,511	9,734	+ 14.9	+ 24.0
Sailing	10,615	8,652	7,271	+ 22.7	+ 46.0
Snowmobiling	8,594	8,628	9,204	- 0.4	- 6.7
Soccer	8,031	6,530	na	+ 23.0	na
Handball	2,634	5,578	5,546	- 52.8	- 52.5
Archery	na	5,529	5,477	na	na
Paddle tennis	na	2,431	2,577	na	na
Ice hockey	1,381	1,668	2,669	- 17.3	- 17.2
Platform tennis	na	405	184	na	na
Squash	358	na	na	na	na

* equipment oriented
**includes both down hill and cross country in 1982 and 1979
na = not available

Source: A.C. Neilson Company

CONSUMER MARKETS

Sports Participation & Attendance

A 1982 study underwritten by the Miller Brewing Company and conducted by Research & Forecasts, New York gave an indication of sports participation by sex in that year.

Although the percentage of women participating in any sport was ahead of the percentage of men in only two measured sports, (gymnastics and aerobic dancing), it is widely agreed that the gap is narrowing quickly. This increase in the percentage of women participating in active sports is seen as a tremendous boost to sales of sporting and fitness equipment as well as active apparel.

Participation in Specified Sports by Sex
(Percent of Population aged 15 & over)

	Participate Once a Month or More (In Season)	
	Men	Women
Swimming	54%	47%
Calisthenics	46	32
Jogging	48	38
Bicycling	42	38
Softball/baseball	47	22
Bowling	25	20
Weightlifting	37	10
Basketball	34	15
Football/rugby	33	8
Tennis, racquet sports	30	25
Pool	32	14
Boating	28	22
Table tennis	21	14
Volleyball	19	16
Skiing	17	10
Golf	18	8
Gymnastics	5	15
Soccer	12	6
Handball	6	3
Wrestling	8	3
Horseback riding	9	8
Archery	8	3
Fencing	2	2
Aerobic dancing	2	25
Lacrosse	2	1
Hockey	6	1
Other team sports	8	4

Source: Miller Lite Report on American Attitudes Towards Sports, 1983

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Sports Participation & Attendance

An annual study on sports attendance is performed by the research department of the Daily Racing Form.

The latest study covering the year 1983 indicated that better than 55 million people attended auto racing events in that year making it the most popular sport attended. Second place was garnered by Thoroughbred racing while third place was Major League baseball.

The greatest percentage increase in attendance in sports was recorded for college baseball whose attendance rose 14.6% in 1983 while minor league baseball recorded the second highest percentage rise (5.2%).

Sport Attendance by Type of Sport, 1981 - 1983

	1983	1982	1981	% Change 1983/1982	% Change 1983/1982
Auto racing (e)	55,122,327	55,238,330	54,267,000	- 0.2%	+ 1.6%
Thoroughbred racing	50,169,430	51,851,587	51,425,024	- 3.2	- 2.4
Major league baseball	45,540,338	44,587,874	26,544,376*	+ 2.1	na
College football	36,301,877	36,538,637	35,807,040	- 0.6	+ 1.4
College basketball	31,471,135	31,105,948	30,935,117	+ 1.2	+ 1.7
Harness racing (e)	25,615,000	25,766,920	26,274,721	- 0.6	- 2.5
Greyhound racing	22,090,018	21,497,988	21,507,617	+ 2.8	+ 2.7
Minor league baseball	18,560,690	17,636,981	16,559,704	+ 5.2	+ 12.1
NFL football	13,277,222	7,367,438*	13,606,990	na	- 2.4
College baseball	12,896,497	11,258,270	8,370,337	+ 14.6	+ 54.1
NHL hockey	12,028,832	11,769,842	11,692,588	+ 2.2	+ 2.9
NBA basketball	10,244,084	10,716,304	10,308,879	- 4.4	- 0.6

* = strike interrupted season
(e) = estimated
na = not applicable

Source: Daily Racing Form
Survey of Sport Attendance
1981 - 1983

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Consumer Expenditures

Total retail sales of sports equipment and all related products, including clothing, footwear, camping gear and hunting equipment, were estimated at $13.6 billion in 1983, according to the National Sporting Goods Association, gaining 13% over the 1982 total. Sales in 1984 are expected to top $15 billion.

The growing interest of U.S. consumers in sports is indicated in annual data compiled by the Bureau of Economic Analysis, U.S. Department of Commerce. In 1983, expenditures for wheel goods, toys and sport equipment, as classified by the Bureau, amounted to over $18 billion (retail value). This represented a gain of 11.3% over 1982 and was 12.3% greater than the total recorded in 1981 in terms of current dollars.

Expenditures for admissions to spectator sports totaled $2.6 billion in 1983 an increase of 8.7% over 1982 and a gain of 14.4% from 1981's total.

Personal Consumption Expenditures Related to Sports & Leisure
(Millions of Dollars)

	1983	1982	1981	% Change 1983/1982	% Change 1983/1981
Admissions to spectator sports	$ 2,578	$ 2,371	$ 2,256	+ 8.7%	+ 14.3%
Wheel goods, toys & sport equipment	18,739	16,830	16,686	+ 11.3	+ 12.3
Wheel goods	16,634	14,811	14,339	+ 12.3	+ 16.0
Boats	1,813	1,741	2,019	+ 4.1	- 15.2
Pleasure aircraft	292	278	328	+ 33.9	- 15.2
Nondurable toys & sport equipment	18,134	15,987	15,188	+ 13.4	+ 19.4

Source: U.S. Bureau of Economic Analysis

RETAIL SALES BY PRODUCT

Bicycles

A strong economy and increased marketing and merchandising efforts by manufacturers combined to boost bicycle sales to 8.9 million units in 1983, up from 6.8 million in 1982 according to the Bicycle Manufacturers Association.

Lightweight bicycles remain the backbone of the bicycle market. In 1983, according to the Association, this category accounted for more than 45% of bicycles sold in the U.S. The BMX (bicycle motorcross) category has been increasing its share of the market since its introduction in 1974. Between 1982 and 1983, the BMX increased its share of the market from 36.8% to 39.8%.

Bicycles (continued)

Emerging demographic patterns are generally favorable for the bicycle industry. A 1982 study of the industry indicated that 31% of all bicycle riders were under 13 years old while another 18% were 25-34 years old. The U.S. Bureau of the Census estimates the total U.S. population age 5 to 13 years will grow to about 34.2 million by 1994, up 15% over the current total of 29.8 million. The population age 25 to 34, however, will grow less than 1%--from 41.0 million in 1984 to a projected 41.156 million in 1994.

Exercise Equipment

Backed by consumers willingness to upgrade to more elaborate equipment than barbells and weights, sales of home exercise equipment skyrocketed to $950 million in 1983, and this was the fastest growing sports/fitness category in 1983.

Although sales of some individual types of home exercise equipment have begun to wane (such as rebounders), a major upswing is continuing in equipment which assimilates the types of equipment currently used in health spas.

The growth in home exercise equipment is expected to continue in the long term--as long as the population continues to show an increasing interest in fitness.

Tennis

The tennis market, which peaked in 1976, has been on the decline ever since. A recent report (Forbes, 12/19/83) indicated that the number of tennis racquets sold in the U.S. had dropped from 9 million in 1976 to 5 million in 1983.

Retailers are currently restructuring their marketing plans in order to contend with the changing market. Most companies are now shying from promotions tended towards new players in favor of campaigns directed to "reentry" players. Analysts believe that the future growth of the tennis market is dependent upon sales to players who left the market after the boom and are now drifting back to it. The promotions to reentry players tend to be of a quality/service nature rather than price cutting promotions.

Racquetball

New court developments and climbing memberships in health clubs with racquetball facilities have curbed the decline in sales of racquetball gear which has been ongoing since the 1979 peak in sports activities.

Much like the tennis market, retailers attempting to stimulate sales are abandoning the entry-level end of the market in favor or mid and upper-priced equipment. With an average of only 50,000 new players a year, marketers do not see the low priced goods as a viable market at the present time.

RETAIL SALES BY PRODUCT

Camping

Sales of camping equipment are estimated at $2.8 billion in 1983, representing approximately 20% of total sporting goods sales in that year. Although sales in this category have not grown dramatically, they have shown slow steady growth over the last few years.

The general popularity of camping has grown in the last few years although it is still far below its peak. The U.S. Department of the Interior reports that in 1983 the number of overnight stays in national parks reached 3.6 million up from 3.4 million in 1979. However this wanes in comparison to the 6 million overnight stays which were recorded in 1965.

Skiing

A total of $812 million was spent on ski apparel, equipment and accessories during the 1982-83 ski season, according to a report by Ski Industries of America. The study, conducted by Sports Marketing and Retail Technology (SMART) found that the 1982-83 season sales marked a decline of 3.9% from the $844.5 million recorded in 1981-82.

Of the $812 million in sales in 1983, $354.9 million was spent on equipment, $380.8 million was spent on apparel and $76.3 million was spent on accessories. Equipment sales in dollars were only slightly higher than 1982's while accessories sales rose by $10 million. Apparel sales marked a decline in dollar volume and percent of the ski market captured between 1982 and 1983.

Most analysts agree that the comeback in ski equipment was due to the superb snow falls which were recorded in 1983. Another prime reason for the growth of the ski market was the influx of athletes from other sports, primarily running, who have turned to skiing as a cardio-vascular activity for the winter months.

Active Apparel

The activewear category which includes a broad definition covering "athleisure" or "street active" wear has been one of the few apparel categories which has registered sustained growth since 1980. Market analysts state that the group has grown from $5 billion in retail sales in 1981 to an estimated $10 billion in 1984.

Activewear has steadily become a more important segment of the sports/fitness complex steadily gaining in its percentage of total sales. This one single category is now estimated to account for approximately one-third of total spending in the sports/fitness category. Many retailers are increasing floor space in their stores to accommodate the increasing sales of activewear.

It is generally agreed that the fastest growing segment of the activewear market is the "street active" area. This category which is designed more for appearance than for functionality is dominated by several firms such as Members-Only, Izod, etc. The functional activewear group is also dominated by several large firms, such as Nike, Addidas, and Puma, etc. The department stores share of the market is seen to be growing as this store type which has traditionally concentrated on the street active market is now seen turning to the participant area. Sporting goods stores, on the other hand, are broadening their lines to include street active as well as functional sportswear.

RETAIL SALES BY PRODUCT

Active Apparel (continued)

Analysts see the growth of activewear continuing into the future as new fashion orientation for the category is found. The activewear category is constantly finding acceptance as a style of dress in areas which were previously closed to the category (office, dining, etc.). As the acceptance of the category grows so should sales continue to climb.

Athletic Footwear

The U.S. retail market for athletic footwear of all types, valued at over $2 billion has matured, and the industry can no longer reasonably expect the sharp escalation in sales which has characterized previous years. According to the U.S. Bureau of the Census, apparent consumption of nonrubber athletic footwear represented 11.2% of 1983's total nonrubber footwear consumption, down from 12.5% in 1982.

According to the National Sporting Goods Association, retail sales of athletic footwear reached $2.2 billion in 1983, a 15% gain over 1982. Sales are predicted to soften to a more modest 7% growth rate by the end of 1984 according to this same group. The two major reasons for the tremendous growth in 1983 were customer trade-ups and price increases, as the average price paid for all sports footwear rose 4% between 1982 and 1983. Sales of gym shoes/sneakers declined in 1982 and 1983, but sales of tennis shoes picked up last year, according to the NSGA. Currently a decided trend is seen back to sneakers for street wear, rather than running shoes.

In terms of pairs, nonrubber athletic footwear consumption (or market supply) was reported at 102.5 million pairs, based on preliminary data for 1983, which represented a gain of less than 1% compared with the 1982 total of 101.6 million pairs.

Imports, which account for nearly 70% of total U.S. supply of athletic footwear of all types, remain a major problem to domestic manufacturers. However, domestic companies have the distinct advantage through their ability to more quickly fill orders and to respond to the fast-changing, demanding market.

Based on market tracking studies by Footwear Market Index (FMI), almost half of all boys' and girls' footwear purchases in 1983 were for tennis shoes/sneakers. Other results from FMI are shown below.

RETAIL SALES BY PRODUCT

Athletic Footwear

Athletic Footwear Purchases, 1983

	Men's	Women's	Boys' & Girls'
Projected footwear purchases (millions of pairs)*	205.4	419.5	54.3
Percent of total:			
Athletic (jogging shoes, etc.)	16.6%	7.1%	18.4%
Tennis shoes/sneakers	20.3	10.2	49.7

* Includes purchases of all types of footwear.

Source: Kormos, Harris, & Associates, Nashville, Tenn.
Footwear Market Index (FMI)

However, a big percentage of athletic footwear is purchased for other than active sports participation. FMI data for 1983 indicate that only 25% of athletic footwear purchased for adults in 1983 was primarily for active sports use; among boys and girls, less than 10% of purchases were for active sports. A natural result has been the development of athleisure footwear, which offers an active look plus wanted fashion features. Consumers have cut back on the use of athletic shoes for casual wear and street active, or athleisure footwear, represents the growth market and is becoming the dominant product among athletic footwear suppliers. This is bringing about changes in distribution patterns.

Bicycles

The Bicycle Manufacturers Association reports that Discounters are the fastest growing outlet in the retail bicycle market, increasing their share by 2.9 percentage points between 1982 and 1983.

Domestic Manufacturer Sales by Type of Outlet, 1983

	1983	1982
Total	100.0%	100.0%
Bicycle shops	28.5	30.7
Discount houses	25.7	22.8
National distributors	23.9	25.2
Regional chains	16.8	17.2
Wholesaler/jobber	5.1	4.1

Domestic Bicycle Shipments by Type of Hub, 1982, 1983

	1983	1982
Domestic Shipments, total	100.0%	100.0%
Coaster brake	59.9	57.8
10+ speed	34.0	34.9
5 speed	0.1	0.3
3 speed	6.0	7.0

Source: Bicycle Manufacturers Association of America,
The 1983 Bicycle Market in Review.

RETAIL SALES BY STORE TYPE

A complete census of retail trade, including sales of broad classifications of merchandise lines, is compiled by the U.S. Bureau of the Census every five years. Information based on the latest census, covering operations in 1982 is currently being released by the Bureau in preliminary form, to be followed by final data in 1985.

The following information on sporting goods sales (including bicycles, athletic equipment and supplies) has been issued as of August 1984. These figures are subject to revision when the final reports are released.

Sporting Goods Sales in Specified Retail Outlets, 1982

Store Type	Number of Establishments*	Sporting Goods Sales(p) Mil. $	Sporting Goods Sales(p) % To Total Store
Sporting goods/bicycle shops	20,129	$5,671.8	75.1%
Department stores**	10,035	2,248.7	2.1
Variety stores	10,814	220.2	2.8
Hardware stores	19,611	276.4	3.3
Hobby, toy & game shops	7,680	185.0	5.7
Mail order houses	7,360***	422.5	3.8

(p) preliminary
* Total number of establishments (locations) in specified classifications, not all of which may sell sporting goods
** Not including leased departments. Discount stores which meet the official definition of a department store are included in this classification.
*** Establishments with payroll.

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade (preliminary reports)

The U.S. Bureau is currently compiling information on consumer expenditures by major product (updating the 1972-1973 Consumer Expenditure Survey). Detailed data should be released by the BLS in the Spring of 1985, according to the present schedule. This will contribute some information on consumer spending for products in the sporting goods/fitness area.

Sporting Goods Stores

According to a preliminary report based on the 1982 Census of Retail Trade, the number of sporting goods and bicycle shops in the U.S. with paid employees rose dramatically between 1977 and 1982 to a total of 20,129. The number of employees rose 37.4% to 106,199. Annual payroll between 1977 and 1982, gained 72.9% during the five year period on a current year basis.

RETAIL SALES BY STORE TYPE

Profile of Sporting Goods & Bicycle Shops, 1977, 1982

	1982(p)	1977	% Change 1982/1977
Number of establishments*	20,129	17,235	+ 16.8%
Number of paid employees	106,199	77,269	+ 37.4
Annual payroll ($1,000)	$924,756	$534,774	+ 72.9

(p) preliminary. Figures are subject to change in final reports.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade
Preliminary Reports RC82-I-28(P)

Total retail sales in sporting goods and bicycle shops, which rose 83.4% between 1972 and 1977, continued their rise through 1982 according to the Commerce Department. In 1982, retail sales in this one outlet type totaled $7,552,371,000, 80.2% higher than the total registered in 1977. Sales per establishment also rose dramatically between 1977 and 1982 rising 52.7% to an average of $373,708. (All data are in current dollars for the years specified and have not been adjusted for price changes. Inflation is, of course, an important factor in evaluation gains in dollar sales.)

Retail Sales of Sporting Goods & Bicycle Stores 1972, 1977, 1982

	1982(p)	1977	1972	Percent Change 1982/1977	Percent Change 1977/1972
Total sales ($1,000)	$7,552,371	$4,190,020	$2,283,851	+ 80.2%	+ 83.4%
Sales per establishment	373,708	243,111	184,837	+ 53.7	+ 31.5

(p) preliminary. Figures are subject to change in final reports.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade
Preliminary Reports, RC82-I-28(P)

Data on the sporting good and bicycle shop outlets by employment size in 1981 indicates that the vast majority (83.9%) had fewer than 10 employees. Only 0.1% of all sporting goods and bicycle shops in 1981 had more than 100 persons on their payrolls.

Current information available through the Census Bureau's monthly retail sales report shows sporting goods/bicycle shop sales up 12% in the first five months of 1983 compared with the same 1983 period. For the year 1983/1982 sales were up 9.7%.

RETAIL SALES BY STORE TYPE

Sporting Goods Stores

Sporting Goods & Bicycle Shops By Employee Size, 1981

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil.$	% of Total
Sporting goods & bicycle shops, total	15,957	100.0%	95.3	100.0%	$813.3	100.0%
By establishment size:						
Under 10 employees	13,393	83.9	44.4	46.6	392.8	48.2
10 - 19 employees	1,802	11.3	24.9	26.1	205.7	25.3
20 - 49 employees	679	4.3	19.8	20.8	156.8	19.3
50 - 99 employees	71	0.4	4.6	4.8	41.3	5.1
100 or more employees	12	0.1	1.6	1.7	16.7	2.1

Source: U.S. Bureau of the Census,
County Business Patterns.

The growing importance of apparel and footwear to the sporting goods industry is clearly evident when retail sales of sporting goods bicycle shops are presented. Between 1977 and 1982, the percentage of sales credited to sporting goods fell 7.6% to 75.1% of total retail sales in these stores. At the same time, apparel and footwear sales climbed from 11.6% of sales to 19.2% exactly filling the gap.

Distribution of Sales by Merchandise Line in Sporting Goods Stores & Bicycle Shops, 1982, 1977
(Percent Distribution)

	1982	1977
Total Sales	100.0%	100.0%
Sporting goods	75.1	82.7
Men's & boys' wear, exc. footwear	7.2	4.3
Women's & girls' wear, exc. footwear	7.2	4.4
Footwear	4.8	2.9
Recreational vehicles	0.2	0.2
Other merchandise	0.6	0.8
Non-merchandise receipts	2.5	2.5
All other receipts	2.4	2.2

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade
Preliminary Industry Reports,
Sporting Goods Stores and Bicycle Shops
RC82-I-28(P) May 1984

RETAIL SALES BY STORE TYPE

Sporting Goods Stores

A list of the leading sporting goods dealers in the U.S. was published in *SportStyle* as noted below.

Estimated Sales of Leading Sporting Goods Retailers, 1980-1982
(Millions of Dollars)

	1983	1982	1981	1980
Herman's	$317**	$275**	$230**	$220
Oshman's	283***	247***	216***	145
Foot Locker	250*	180*	200*	102
L.L. Bean	237**	225**	172**	120
Big Five	130*	120*	120*	99
Eddie Bauer	119*	107*	100**	80
Sunset Sports	110*	100**	100*	88
Land's End	90*	80**	na	na
Sport Mart	90*	na	na	na
REI	80***	67**	55	49

na = not available
* market estimate
** statement from corporate officer
*** annual report

Source: *SportStyle* (Fairchild Publications)
(August 6, 1984; May 23, 1983; April 19, 1982;
April 20, 1981)

Department Stores

In recent years department stores have allocated increasing footage on their sales floors to athletic departments, including functional sportswear, and athleisure and street active wear have become more important in regular sportswear departments.

According to preliminary results found in the 1982 census of retail trade (U.S. Bureau of the Census), sporting goods accounted for 2.1% of total department store sales in that year. Activewear's share of the 38.2% of total store sales represented by women's, men's, girls', boys' apparel and footwear has not been reported, but is probably significant. (Total department store sales in 1982 amounted to $107.9 billion; in 1983, $116.7 billion, according to Census Bureau monthly retail sales reports).

Typical operating results in department stores in 1982, according to the National Retail Merchants Association, showed a strong performance in active sportswear in junior sizes (women's), with sales up a median 42%. Women's and misses' active sportswear and men's also registered gains, but sales of sporting goods departments were reported to be down in the typical store.

RETAIL SALES BY STORE TYPE

Department Stores

The NRMA reported that sporting goods contributed a typical, or median, 0.7% of sales in their reporting department stores. This is in contrast with the Census Bureau's overall figure for all department stores of 2.1%.

Selected Typical (Median) 1982 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Women's & Misses' Active Sportswear*	Junior Active Sportswear*	Men's Active Sportswear*	Sporting Goods
Net sales % change from last year	+ 9.1%	+ 42.2%	+ 10.1%	- 0.7%
Sales % to total store	1.1	0.4	0.7	0.7
Net sales % of merchandising division	4.7	1.9	5.4	11.3
$ sales per square foot of selling space	$158.8	$ 83.6	$207.6	$62.0
Cumulative markon, %	51.4%	52.3%	50.7%	44.1%
Gross margin, % of sales including cash discounts	47.0	47.7	44.7	34.8
Markdowns, retail, % of sales	15.7	18.1	13.7	16.5
Returns, % of sales	9.0	6.8	10.0	7.2
Number of stock turns	3.8	4.0	3.1	1.9
Sales people's salaries, % of sales	6.0	4.9	7.0	8.9
Sales promotion, % of sales	2.8	3.3	3.3	3.7

*Active sportswear includes swimwear, beachwear and accessories and all other summer playwear; ski jackets, pants and other winter sportswear.

Source: National Retail Merchants Association, Merchandising & Operating Results (1983 Edition).

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage

Month	Bicycles	Sporting Goods
January	1.7%	3.6%
February	3.7	4.0
March	7.2	6.6
April	10.3	8.8

(continued)

Monthly Distribution of Retailers' Newspaper Advertising Linage
(continued)

	Bicycles	Sporting Goods
May	13.2%	12.9%
June	12.8	10.9
July	6.3	7.8
August	9.5	8.7
September	6.7	7.7
October	6.2	9.0
November	10.9	9.1
December	11.5	10.9
Total linage	100.0%	100.0%

Source: Newspaper Advertising Bureau,
1984 Newspaper Advertising Planbook

CONSUMER PRICE INDEX

The rate of increase of consumer prices in the sporting goods industry has been steadily declining since 1981. Between 1982 and 1983, the rate of increase in consumer prices of sporting goods and equipment was only 2.5%, well below the national average of 3.8%. Two of the measured categories, indoor and warm weather sport equipment and bicycles, actually registered declines in the overall consumer price level while sport vehicles and other sports equipment showed rises.

As of May 1984, the price level for all sporting goods and equipment was 3.6% over the index a year earlier. The price level for indoor and warm weather sports equipment was down 2.7%.

Consumer Price Indexes for Specified Sporting Goods (All Urban Consumers)
(December 1977 = 100, unless otherwise indicated)

	May	Annual Averages			Percent Change	
	1984	1983	1982	1981	1983/1982	1982/1981
All items*	309.7	297.4	286.6	272.3	+ 3.8%	+ 5.3%
Sporting goods & equipment	138.0	127.8	124.7	120.0	+ 2.5	+ 3.9
Sport vehicles	143.0	127.0	122.7	118.9	+ 3.5	+ 3.2
Indoor & warm weather sport equipment	117.3	117.1	118.0	116.5	- 0.7	+ 1.3
Bicycles*	200.8	199.2	199.3	192.1	- 0.1	+ 3.7
Other sporting goods & equipment	134.6	132.8	128.8	123.0	+ 3.1	+ 4.7

* 1967 = 100
(p) preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics

CONSUMER BUYING HABITS

Active Sportswear

In a survey undertaken in September 1983 by R.H. Bruskin Associates for Daily News Record (September 29, 1983), a fifth of a nationally representative sample of 500 men said that in the 12 months following the survey purchases of active sportswear items would be greater than in the preceding 12 months. Almost a third (32.6%) of the men and women aged 18-34 years intended to raise their level of spending on active sportswear over this period.

Intention to Purchase Active Sportswear Compared With The Previous 12 Months

	Intend to Purchase:						
	Much More	Somewhat More	About the Same	Somewhat Less	Much More	None	Don't Know
Total	8.2%	13.6%	52.4%	9.1%	11.4%	4.2%	1.1%
By Sex							
Male	7.6	14.9	56.7	7.0	8.2	4.1	1.5
Female	8.8	12.3	48.5	11.1	14.2	4.3	0.8
By Age							
18 - 24 years	15.6	16.6	48.7	8.6	9.6	1.0	--
25 - 34 years	11.5	21.7	46.3	10.8	8.3	1.0	0.5
35 - 49 years	5.7	15.9	60.0	7.1	8.4	1.9	1.0
50 - 64 years	4.1	7.3	61.2	7.7	15.2	3.3	1.3
65 years & older	3.5	4.6	45.7	10.9	14.8	17.4	3.1
By Income							
Under $15,000	8.1	6.3	47.1	11.8	16.6	8.4	1.7
$15,000-$19,999	9.9	10.7	50.4	10.0	12.8	6.3	--
$20,000-$29,999	10.0	19.2	53.9	7.5	7.6	1.1	0.6
$30,000-$39,999	6.3	14.1	61.8	7.6	9.4	0.7	--
$40,000 & over	4.9	26.0	59.2	4.1	2.6	2.5	0.8
By Region							
Northeast	8.4	15.7	46.7	8.6	13.4	6.0	1.1
North Central	4.3	13.7	55.0	11.2	10.9	4.1	0.9
South	11.0	11.9	54.4	8.6	10.7	2.2	1.2
West	8.5	13.9	52.0	7.8	10.7	5.6	1.5

Source: R. H. Bruskin Associates,
Daily News Record, September 29, 1983.

CONSUMER BUYING HABITS

Information on purchase patterns for men's and women's active sportswear covered in the following data for the years 1982 and 1983 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, New York. The statistics are based on reports from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

Active Sportswear - Men's

NPD panel purchases in this activewear category were off 21.0% in 1983 compared with the previous year, but the amount spent on sweatpants, joggers and jumpsuits declined by 1.5% over the same period.

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	11.1	20.1	9.3	26.2
Mass merchandisers (Sears/Penneys/Wards/K-mart)	53.9	36.9	39.2	36.4
Discount stores	9.0	35.6	5.3	26.6
Specialty stores	20.8	4.2	42.6	5.6
All other outlets	5.3	3.2	2.8	5.3

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $14.00	16.0	34.3	5.0	14.2
$14.00 - $19.99	39.8	28.6	27.8	25.2
$20.00 & over	44.1	37.0	67.2	60.6

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Fibers, 1982

	1982	
	Units	Dollars
Total	100.0%	100.0%
Polyester/cotton blend	74.9	71.0
100% polyester & other polyester blends	9.8	11.8
100% cotton	15.2	17.3

NOTE: 1983 data by fiber not shown due to a significant percentage of non-responses.

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Men's

As reported by NPD, men's swimwear sales in 1983 dipped 7.1% in dollars and 8.7% in the quantity purchased compared with 1982.

Purchases of Men's Swimwear by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	30.7	24.7	36.3	30.5
Mass merchandisers (Sears/Penneys/Wards/K-mart)	25.3	30.3	23.3	28.7
Discount stores	17.9	16.0	13.6	10.2
Specialty stores	10.6	15.0	12.2	17.6
All other outlets	15.1	11.9	14.2	11.3
No answer	0.4	2.0	0.4	1.7

Purchases of Men's Swimwear by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.00	26.9	41.8	13.3	22.4
$7.00 - $10.99	42.2	24.1	38.9	20.4
$11.00 & over	30.9	34.2	47.8	55.2

Purchases of Men's Swimwear by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	3.4%	3.7%	4.4%	5.5%	17.2%	27.2%	19.5%	12.8%	2.8%	1.8%	1.3%	0.4%	100.0%
1982	1.8	4.0	7.4	6.2	14.6	27.5	25.9	5.8	3.9	0.3	0.4	2.1	100.0
Dollars:													
1983	3.3	5.8	4.3	5.5	16.3	28.2	16.3	14.2	2.7	1.3	1.9	0.1	100.0
1982	2.5	5.9	6.1	6.8	17.6	31.8	18.2	6.5	2.2	0.4	0.02	1.8	100.0

NPD member households reported purchasing 25.7% more sweatshirts in 1983 than the prior year. These sweatshirts had a total retail value 32% higher than in 1982.

Purchases of Men's Sweatshirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	16.5	14.7	19.5	15.1
Mass merchandisers (Sears/Penneys/Wards/K-mart)	32.5	41.1	31.6	41.7
Discount stores	26.7	20.3	22.1	18.3
Specialty stores	9.3	11.1	12.1	12.7
All other outlets	14.6	10.8	14.4	10.7
No answer	0.4	2.0	0.4	1.4

(continued)

CONSUMER BUYING HABITS

Active Sportswear-Men's

Purchases of Men's Sweatshirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.00	35.6	40.6	18.2	21.3
$7.00 - $10.99	34.9	32.8	33.3	32.6
$11.00 & over	29.6	26.6	48.4	46.1

Purchases of Men's Sweatshirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	7.8%	5.3%	4.8%	4.6%	2.8%	2.1%	2.5%	4.0%	5.6%	11.2%	18.6%	30.7%	100.0%
1982	6.4	8.0	6.6	3.5	2.8	3.0	4.4	4.3	4.7	10.2	17.1	29.0	100.0
Dollars:													
1983	6.3	3.9	4.7	3.4	2.6	2.3	2.0	3.8	5.1	11.6	19.6	34.7	100.0
1982	6.1	5.3	5.3	2.6	2.8	3.5	3.7	3.8	4.8	8.6	19.2	35.2	100.0

Source: NPD Special Industry Services

Activewear - Women's

As reported by NPD, women's swimwear sales in 1983 dipped 8.3% in dollars and 4.2% below the quantity purchased in 1982.

Purchases of Women's Swimwear by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	31.4	24.0	41.4	32.2
Mass merchandisers (Sears/Penneys/Wards/K-mart)	25.9	28.9	20.1	22.8
Discount stores	10.8	11.3	6.9	8.1
Specialty stores	22.4	25.9	23.6	27.8
All other outlets	9.1	9.4	7.3	8.4
No answer	0.4	0.5	0.7	0.7

Purchases of Women's Swimwear by Price Point, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $11.99	28.4	32.6	11.8	13.3
$12.00 - $19.99	33.4	29.6	28.1	25.4
$20.00 - $27.99	17.6	18.2	21.6	23.3
$28.00 & over	20.6	19.6	38.5	38.0

(continued)

CONSUMER BUYING HABITS

Active Sportswear - Women's

Purchases of Women's Swimwear by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.6%	2.9%	6.0%	10.4%	15.6%	25.3%	22.9%	10.9%	1.9%	1.0%	0.8%	0.9%	100.0%
1982	1.5	3.8	7.2	6.8	16.9	20.7	31.0	8.0	3.0	0.8	0.2	0.1	100.0
Dollars:													
1983	1.3	3.5	6.2	10.1	16.5	26.3	22.3	10.8	1.3	0.7	0.4	0.9	100.0
1982	1.6	3.9	8.2	7.8	16.6	20.8	30.6	8.0	1.6	0.5	0.5	*	100.0

* Less than 0.1%

Source: NPD Special Industry Services

Dollar expenditures of women's shorts and tennis dresses increased 18.5% in 1983, as the quantity purchased by NPD households rose 8.7%.

Purchases of Women's Shorts/Tennis Dresses by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0
Department stores	21.4	19.7	27.2	27.7
Mass merchandisers (Sears/Penneys/Wards/K-mart)	27.9	32.5	20.6	25.5
Discount stores	18.9	17.4	14.3	13.7
Specialty stores	20.0	20.4	26.0	22.9
All other outlets	11.3	9.5	11.3	9.6
No answer	0.6	0.6	0.6	0.6

Purchases of Women's Shorts/Tennis Dresses by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $4.99	36.1	46.9	14.7	21.5
$5.00 - $10.99	45.1	36.1	45.3	39.7
$11.00 & over	18.8	17.0	40.0	38.8

Purchases of Women's Shorts/Tennis Dresses by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.3%	1.9%	7.4%	12.7%	19.5%	25.6%	19.7%	6.6%	2.5%	1.7%	0.6%	0.4%	100.0%
1982	1.1	3.5	7.6	13.5	23.9	19.4	19.4	6.3	3.1	1.1	0.4	0.7	100.0
Dollars:													
1983	1.4	2.9	8.4	13.0	19.4	23.7	19.9	6.3	2.7	0.8	0.9	0.6	100.0
1982	1.2	3.2	9.3	14.0	24.9	19.9	16.8	6.4	2.1	1.1	0.4	0.7	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Women's

In 1983, women's sweatshirt purchases made by NPD panel members climbed 43.8% in dollars and 40.0% in units versus a year earlier.

Purchases of Women's Sweatshirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	16.0	14.1	19.3	17.4
Mass merchandisers (Sears/Penneys/Wards/K-mart)	31.0	34.6	28.3	31.4
Discount stores	18.0	19.0	14.5	15.4
Specialty stores	17.6	18.1	20.4	20.0
All other outlets	16.3	13.8	16.5	15.3
No answer	1.0	0.4	1.1	0.6

Purchases of Women's Sweatshirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.99	45.3	47.2	26.5	27.9
$8.00 - $13.99	36.8	36.8	39.3	40.5
$14.00 & over	17.8	16.0	34.1	31.5

Purchases of Women's Sweatshirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	6.2%	7.7%	5.9%	4.2%	4.5%	3.7%	6.1%	8.8%	7.9%	11.6%	13.8%	19.5%	100.0%
1982	6.3	6.0	8.4	4.1	3.6	3.0	6.1	9.6	10.2	13.0	13.0	16.7	100.0
Dollars:													
1983	5.7	7.6	5.6	3.9	4.1	3.6	5.0	9.8	8.0	11.1	14.9	20.5	100.0
1982	4.9	4.7	8.7	3.6	3.6	2.5	4.7	10.2	10.2	12.4	15.4	10.0	100.0

Source: NPD Special Industry Services

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included. (May)

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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